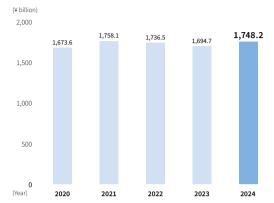
Digital Unit

Mobile Game Market (Japan)

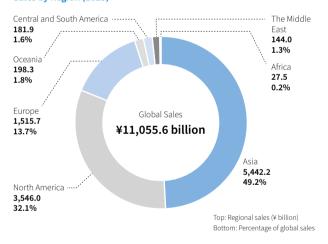
Mobile Game Market Scale Trend



Source: "Famitsu Game White Paper 2025" (KADOKAWA ASCII Research Laboratories, Inc.) Note: Prepared based on information as of July 2025

Mobile Game Market (Global)

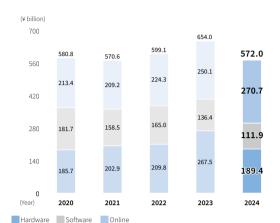
Sales by Region (2023)



Source: "Famitsu Mobile Game White Paper 2025" (KADOKAWA ASCII Research Laboratories, Inc.) Airnow Data

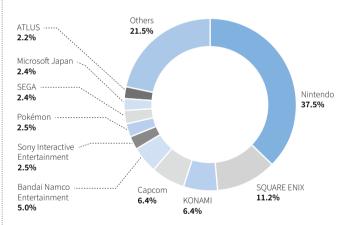
Home Console Game Market (Japan)

Home Console Game Market Scale Trend



Source: "Famitsu Game White Paper 2025" (KADOKAWA ASCII Research Laboratories, Inc.) Note: Prepared based on information as of July 2025

Unit Sales Share by Manufacturer (FY 2024)



Collection period: April 1, 2024, to March 30, 2025 Source: "Famitsu Game White Paper 2025" (KADOKAWA ASCII Research Laboratories, Inc.) Note: Company names are as of the collection date.

Toys and Hobby Unit

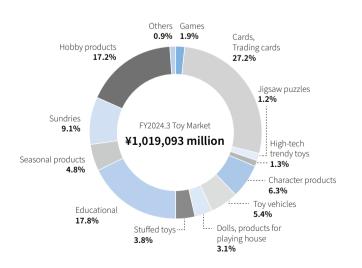
Toy Market (Japan)

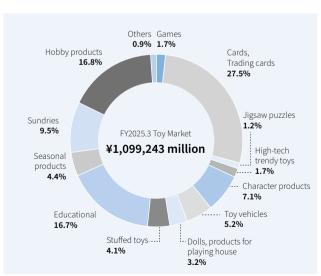
[Toy Market Scale]

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

	(Unit: ¥ million, manufacturer's suggested retail price basis)		
Major Categories	FY2024.3	FY2025.3	FY2024.3 vs FY2025.3
Games General games (including mini electronic games), 3D puzzles, others (including party games, humorous games, magic tricks)	18,889	18,998	100.6%
Cards, Trading cards	277,425	302,463	109.0%
Jigsaw puzzles	12,291	12,735	103.6%
High-tech trendy toys Interactive toys, robots, PC-related products	12,853	18,303	142.4%
Character products TV character toys, movie character toys, etc	64,707	78,510	121.3%
Toy vehicles Mini cars, railroad toys, RC toys, electric, others (racing, spring, metal toys, etc.)	54,783	56,631	103.4%
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)	31,531	35,361	112.1%
Stuffed toys Character stuffed toys, non-character stuffed toys	39,092	45,082	115.3%
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)	181,143	183,422	101.3%
Seasonal products Small sparklers, summer toys, summer goods, small toys, sports toys, sports supplies, outdoor products	49,101	48,430	98.6%
Sundries Variety goods, gifts, interior goods, housewares, stationery, apparel, others (including Christmas goods, Halloween goods, etc.)	92,346	104,717	113.4%
Hobby products Model kits, RC hobby products, model trains, figures, others	174,843	184,458	105.5%
Others	10,089	10,133	100.4%
Total	1,019,093	1,099,243	107.9%

FY2024.3 FY2025.3



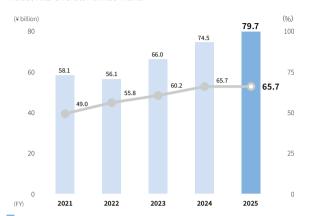


- 1. Each fiscal year covers the period from April 1 to March 31.
- 2. The scale of the toy market is as follows.
- · In principle, the market is created by the original products and own-brand products of member companies of the Japan Toy Association (including members of its affiliated organizations) and of exhibitors at the International Tokyo Toy Show, regardless of distribution channels.
- However, in the Educational category, products such as baby products and ride-on toys have their own distinct markets, and thus distribution through channels such as drugstores is excluded.
- · The Hobby products category includes the distribution of models.

Source: Research by the Japan Toy Association

Model Kits Market (Japan)

Model Kits Overall Market Trend



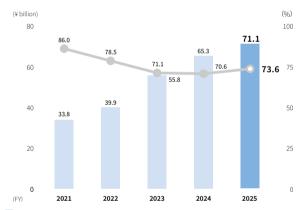
Market scale (left)

BANDAI SPIRITS share (right)

Source: Research by BANDAI SPIRITS (amounts are on a suggested retail price basis)

Fiscal years ended March 31

Character Model Kits Market Trend



Market scale (left)

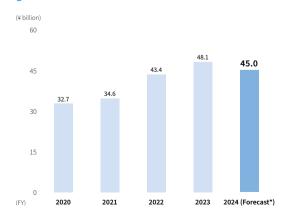
SANDAI SPIRITS share (right)

Source: Research by BANDAI SPIRITS (amounts are on a suggested retail price basis)

Fiscal years ended March 31

Figure Market (Japan)

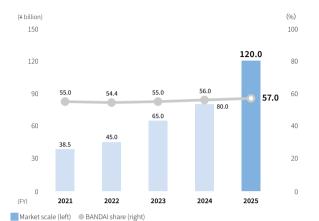
Figure Market Scale Trend



Source: "Toy Industry white paper 2025" (Yano Research Institute Ltd.)
* Domestic shipment value basis, forecasts as of December 2024

Capsule Toy Market (Japan)

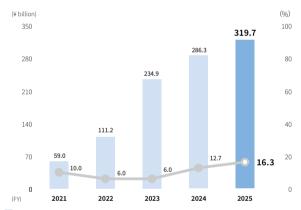
Capsule Toy Market Trend



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



Market scale (left)

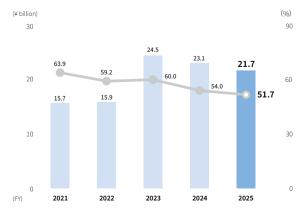
Source: Research by BANDAI share (right)

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 CARDDASS.

Fiscal years ended March 31

Digital Card Market Scale Trend



Market scale (left)

BANDAI share (right)

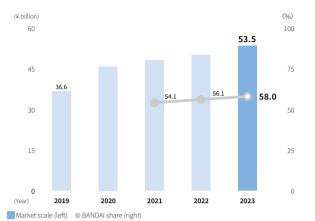
Source: Research by BANDAI (amounts are on a suggested retail price basis)

Fiscal years ended March 31

Visual and Music (IP Production) Unit

Candy Toy Market (Japan)

Candy Toy Market Trend

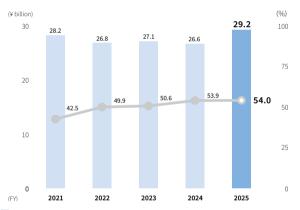


Source: 2025 version of research from FUJI KEIZAI regarding food marketing (No. 1)

Note: Market-scale figures are rounded down to the nearest decimal place.

Children's Lifestyle (Sundries) Market (Japan)

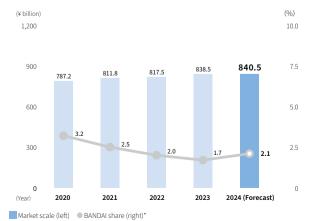
Children's Lifestyle (Sundries) Market Trend



Market scale (left) BANDAI share (right)
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

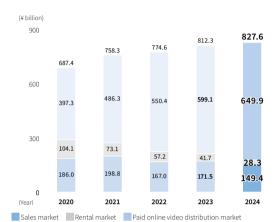


Source: Compiled by Bandai Namco Holdings based on the "2025 Survey on the Babies' and Children's Clothing Retail Market" (Yano Research Institute Ltd.)

 The BANDAI share was calculated by Bandai Namco Holdings for the fiscal years ended March 31 based on the market size on a retail price basis.

Visual Software Market (Japan)

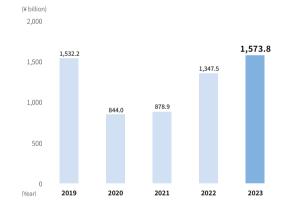
Visual Software Market Scale Trend



Source: 2024 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

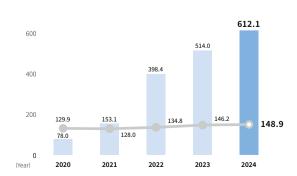


Source: Prepared by Media Development Research Institute Inc. based on "Information Media White Paper 2025" from DENTSU INC., Dentsu Media Innovation Lab

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

(¥ billion)



Live entertainment market Audio record production value

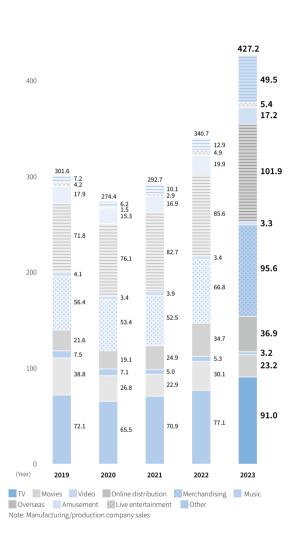
Note: Information regarding the live entertainment market is calculated based on the information from full members of the All Japan Concert & Live Entertainment Promoters Conference.

Sources: Recording Industry Association of Japan, All Japan Concert & Live Entertainment Promoters Conference

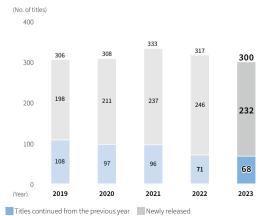
Animation Market (Japan)

Animation Market Scale Trend

(¥ billion) 500



Number of TV Animation Titles

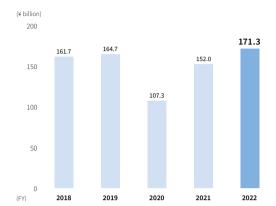


Source: "Animation Industry Report 2024," The Association of Japanese Animations

Amusement Unit

Amusement Machine Market (Japan)

Amusement Machine Scale Trend

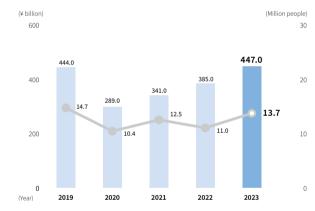


Source: 2022 report on the state of the amusement industry by the Japan Amusement Industry Association

Fiscal years ended March 31

Amusement Facility Market (Japan)

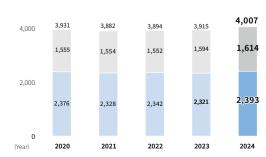
Amusement Facility Market Scale and Number of Participants (Game Centers)



Market scale (left) Number of participants (right)
Source: "Leisure White Paper 2024," Japan Productivity Center

Trend in Number of No.5 Facilities (Operation of Game Centers, etc.)

(No. of facilities) 6,000



Full-time Part-time

Source: National Police Agency, Community Safety Bureau, Safety Division