

Southeast Asia Sports and Outdoor Toys Market: Current Analysis and Forecast (2025-2033)

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Abstracts

Sports and outdoor toys are play products that are aimed at promoting physical activity, skill development, and active play, and are usually utilized in open or semi-open settings. Such toys promote physical fitness, motor coordination, and socialization in children and young users.

The Southeast Asian Sports and Outdoor Toys market is expected to exhibit a growth rate of 6.72% during the forecast period (2025-2033F). The rising child population, greater parental awareness of healthy habits, and broad cultural acceptance of outdoor and community-based play have driven market growth. The growing demand for outdoor play equipment is due to urbanization and the development of residential townships and public parks. Further adoption in urban and semi-urban areas is also increasing, driven by greater e-commerce penetration and improved retail access. Therefore, these factors make the long-term demand of various age groups and price categories.

Based on product type, the market is segmented into sports toys and outdoor toys. Among these, the outdoor toys market held the largest share in 2024. The outdoor toys are a key growth driver because they are highly compatible with the climate of Southeast Asia, residential play culture, and family-oriented lifestyles of the region. The ride-ons, water toys, and play structures are among the categories with high repeat demand in both urban and semi-urban areas. To manufacturers, this segment enables volume sales and brand stickiness, driving portfolio growth and local manufacturing.

Based on the age group, the market is segmented into less than 5 years, between 5 - 10 years, teens & adults. Among these, the between 5 - 10 years

segment held the dominant share of the Southeast Asia Sports and Outdoor Toys market in 2024. The 5-10-year age group is the market growth driver with more participation in organized sports and outdoor games with the support of schools and community programs. The kids in this age group determine repeat purchases in a variety of toy categories, ranging from simple sports equipment to outdoor play sets. The segment is heavily targeted by companies because demand cycles are predictable, and parental spending interest is high.

Based on the distribution channel, the market is segmented into online retail, specialty stores, hypermarkets & supermarkets, and others. Among these, the online retail segment is expected to grow at a significant CAGR during the forecast period (2025-2033). Online retail promotes market adoption by increasing the product penetration beyond the metro cities and having direct-to-consumer interaction. The e-business sites also offer new brands a lower barrier to entry and enable the existing brands to grow more rapidly with deals and packages. The channel is also useful in data-driven product launches and quick Stock Keeping Unit (SKU) movement that enhances competition positioning. As per the International Trade Administration, U.S. Department of Commerce, in 2023, cross-border ecommerce development varies by individual markets within the Asia Pacific region, with China (71.4) scoring the highest in a ranked development index. South Korea (66.7) and Singapore (65.5) are the next-ranked markets on the cross-border ecommerce development index, followed by Japan (61.1), Thailand (58.8), Malaysia (57.7), and Indonesia (54.3).

For a better understanding of the market adoption of the Southeast Asian Sports and Outdoor Toys market, it is analyzed based on its regional presence in Southeast Asia, including Indonesia, Thailand, the Philippines, Vietnam, Malaysia, Singapore, and the Rest of Southeast Asia. Vietnam is expected to grow with a high expected CAGR during the forecast period (2025-2033). This is mainly due to rapid growth, driven by a young demographic profile and rising disposable incomes. The rising consciousness of physical activity and early childhood development is leading to the uptake of sports and outdoor toys in the cities. The manufacturing capabilities are also high in the country and provide a quicker availability of the product and competitive prices. Also, the increased penetration in the market is growing faster due to the expansion of modern retail and online channels. To the companies, Vietnam presents both demand and supply side opportunities in Southeast Asia. For example, on September 10, 2025, Kuehne+Nagel and the LEGO Group expanded their long-standing

partnership with the opening of a new Regional Distribution Centre (RDC) in Dong Nai, Vietnam. The centre will serve as a distribution hub for products manufactured at LEGO Manufacturing Vietnam, the LEGO Group's newest factory in Ho Chi Minh City, which opened earlier this year.

Some major players running in the market include DECATHLON SINGAPORE PTE. LTD. (Decathlon Group), Bestway Inflatables & Material Corp., Hasbro, PT Mattel Indonesia's (PTMI) (Mattel Inc.), Simba Toys (Simba Dickie Group), PlanToy Inc., Wonderworld Products Co., Ltd, Step2, and Others.

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