

# **Toys and Games in India**

June 2025

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### Toys and Games in India

#### EXECUTIVE SUMMARY

Dynamism for both video games and traditional toys and games

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Despite the growth of toys and games, some consumers are concerned about their finances Maniams Design Studio integrates local culture into toys and games Reliance leverages brand recognition for growth in toys and games Chart 2 - Reliance Games Has a Wide Mobile Games Offering

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Mattel overtakes Hasbro, while fragmentation increases SuperGaming and WoodBee Toys succeed through innovation and cultural relevance NODWIN Gaming expands through AFK Gaming, Trinity Gaming, and Freaks 4U Gaming SuperGaming and Funskool launch innovative products to meet local preferences

#### CHANNELS

Retail e-commerce remains the leading sales channel for toys and games Croma and Reliance Digital create experiential gaming zones Swiggy Instamart and Hamleys partner to offer quick commerce for premium toys and games

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Scientific/educational toys shows the strongest increase, as parents facilitate their children's learning Chart 12 - Smartivity Offers a Range of STEM Toys BIS certification improves safety and ensures consumer trust Maniams Design Studio launches culture-themed puzzles Kona and Jharokha

#### WHAT'S NEXT?

Household income set to rise, propelling the expansion of traditional toys and games Scientific/educational toys to reshape traditional toys and games Growing demand for toys that reflect Indian culture and heritage Sustainability expected to rise in importance in traditional toys and games Global giants will have to adapt to the rise of Indian start-ups

#### COMPETITIVE LANDSCAPE

Mattel leads due to popularity of brands including Barbie, Uno, and Hot Wheels Chart 13 - Mattel Has a Wide Range of Popular Brands Toys 'R' Us India proactively embraces BIS certification Jammbo and Toyshine expand their reach through diverse distribution strategies Funskool Atomic Launcher offers safe, washable, outdoor play for children

#### CHANNELS

Traditional toys and games stores continues to dominate due to established customer loyalty Amazon and Flipkart gain share through convenience and wide product range Zepto and Blinkit are leaders in quick commerce, but Swiggy Instamart rises rapidly

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#### COMPETITIVE LANDSCAPE

Sony and Microsoft see falling shares due to hardware supply problems 99Games leverages engagement and content to bolster its presence in mobile games NODWIN Gaming acquires Freaks 4U Gaming to expand its global reach SuperGaming's Indus Battle Royale innovates with Indian cultural elements

#### CHANNELS

Retail e-commerce gains share in video games distribution Video games hardware has the highest share of offline sales Offline retailers integrate gaming to boost customer engagement and brand loyalty Steam experiences user base growth as digital distribution dominates

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