



Euromonitor
International

Toys and Games in Western Europe

July 2024

Table of Contents

INTRODUCTION

Scope

Key findings

REGIONAL OVERVIEW

Gap between the main categories not as great as in other toys and games regional markets

Western Europe records the weakest growth over 2018-2023

Return to positive growth not currently expected until 2025

Video games category continues growing in the German market in 2023

Traditional toys and games remain in decline in France in 2023

Video games responsible for all the new sales added in toys and games in 2018-2023

Traditional toys and games being impacted by low birth rates in major markets

E-commerce the dominant channel for sales of toys and games

The online channel accounts for more than three quarters of video games sales

LEADING COMPANIES AND BRANDS

Increasing concentration in Turkey over 2018-2023

Despite gains for Sony, Microsoft becomes the number one player in 2023

The UK is the main revenue generator for half of the top 10 players

PlayStation displaces Lego at the top of the rankings

FORECAST PROJECTIONS

Return to positive growth expected for toys and games from 2025

With low or declining birth rates, kids will become increasingly important

COUNTRY SNAPSHOTS

France: Market Context

France: Competitive and Retail Landscape

Germany: Market Context

Germany: Competitive and Retail Landscape

Italy: Market Context

Italy: Competitive and Retail Landscape

Netherlands: Market Context

Netherlands: Competitive and Retail Landscape

Spain: Market Context

Spain: Competitive and Retail Landscape

Sweden: Market Context

Sweden: Competitive and Retail Landscape

Switzerland: Market Context

Switzerland: Competitive and Retail Landscape

Turkey: Market Context

Turkey: Competitive and Retail Landscape

UK: Market Context

UK: Competitive and Retail Landscape

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/toys-and-games-in-western-europe/report.