



Passport

Video Games in Thailand

Euromonitor International

June 2022

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Some content and data have been changed.

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LIST OF CONTENTS AND TABLES

Video Games in Thailand - Category Analysis	1
KEY DATA FINDINGS.....	1
2021 DEVELOPMENTS.....	1
For most Thais, mobile games are video games	1
Interest in static consoles largely remains limited to affluent young males	1
Game makers tap local celebrities as they seek to stand out in an increasingly crowded field	2
PROSPECTS AND OPPORTUNITIES.....	2
The dominance of mobile gaming will deepen	2
Physical media will continue to slide towards obsolescence	2
Localisation will be A key battleground	3
CATEGORY DATA.....	3
Table 1 Sales of Video Games by Category: Value 2016-2021	3
Table 2 Sales of Video Games by Category: % Value Growth 2016-2021	4
Table 3 NBO Company Shares of Video Games: % Value 2017-2021	4
Table 4 LBN Brand Shares of Video Games: % Value 2018-2021	5
Table 5 NBO Company Shares of Video Games Hardware: % Value 2017-2021	5
Table 6 LBN Brand Shares of Video Games Hardware: % Value 2018-2021	6
Table 7 NBO Company Shares of Video Games Software: % Value 2017-2021	6
Table 8 Distribution of Video Games by Format: % Value 2016-2021	7
Table 9 Distribution of Video Games Hardware by Format: % Value 2016-2021	7
Table 10 Distribution of Video Games Software by Format: % Value 2016-2021	8
Table 11 Distribution of Video Games Software (Physical) by Format: % Value 2016-2021	9
Table 12 Distribution of Video Games Software (Digital) by Format: % Value 2016-2021	10
Table 13 Forecast Sales of Video Games by Category: Value 2021-2026	11
Table 14 Forecast Sales of Video Games by Category: % Value Growth 2021-2026	11
Toys and Games in Thailand - Industry Overview.....	13
EXECUTIVE SUMMARY.....	13
Toys and games in 2021: The big picture	13
2021 key trends	13
Competitive landscape	13
Retailing developments	14
What next for toys and games?	14
MARKET DATA.....	15
Table 15 Sales of Toys and Games by Category: Value 2016-2021.....	15
Table 16 Sales of Toys and Games by Category: % Value Growth 2016-2021	15
Table 17 NBO Company Shares of Toys and Games: % Value 2017-2021	15
Table 18 LBN Brand Shares of Toys and Games: % Value 2018-2021	15
Table 19 Distribution of Toys and Games by Format: % Value 2016-2021.....	16
Table 20 Forecast Sales of Toys and Games by Category: Value 2021-2026.....	17

Table 21	Forecast Sales of Toys and Games by Category: % Value Growth 2021-2026	17
DISCLAIMER		18
SOURCES.....		18
Summary 1	Research Sources.....	18

VIDEO GAMES IN THAILAND - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2021 DEVELOPMENTS

For most Thais, mobile games are video games

Having surged by almost a third in 2020, the rate of growth in retail constant value sales...

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Interest in static consoles largely remains limited to affluent young males

Due to the popularity of mobile games, demand for static...

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Game makers tap local celebrities as they seek to stand out in an increasingly crowded field

Video game software companies are increasingly collaborating with local celebrities in an effort...

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PROSPECTS AND OPPORTUNITIES

The dominance of mobile gaming will deepen

Retail constant value sales of video games will continue to exhibit vigorous growth throughout..

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Physical media will continue to slide towards obsolescence

Due to the overwhelming popularity of mobile and online gaming, e-commerce is the...

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Localisation will be A key battleground

Offering a wide variety of games which are suitable for the local population will be key to maintaining growth...



CATEGORY DATA

Table 1 Sales of Video Games by Category: Value 2016-2021

THB million	2016	2017	2018	2019	2020	2021
Video Games Hardware	Data removed from sample					
- Hand-Held Consoles						
- Static Consoles						
- AR/VR Headsets						
Video Games Software						
- Video Games Software (Physical)						
-- Computer Games (Physical)						
-- Console Games (Physical)						
- Video Games Software (Digital)						
-- Computer Games (Digital)						
-- Console Games (Digital)						
-- Online Games						
-- Mobile Games						
- Video Games Software by Platform						
-- Console Games						
-- Computer Games						
-- Online Games						
-- Mobile Games						
- Video Games Software by Format						
-- Video Games Software (Game Sales)						
-- Video Games Software (In-Game Purchases)						

Video Games

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 2 Sales of Video Games by Category: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Video Games Hardware	Data removed from sample		
- Hand-Held Consoles			
- Static Consoles			
- AR/VR Headsets			
Video Games Software			
- Video Games Software (Physical)			
-- Computer Games (Physical)			
-- Console Games (Physical)			
- Video Games Software (Digital)			
-- Computer Games (Digital)			
-- Console Games (Digital)			
-- Online Games			
-- Mobile Games			
- Video Games Software by Platform			
-- Console Games			
-- Computer Games			
-- Online Games			
-- Mobile Games			
- Video Games Software by Format			
-- Video Games Software (Game Sales)			
-- Video Games Software (In-Game Purchases)			
Video Games			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 NBO Company Shares of Video Games: % Value 2017-2021

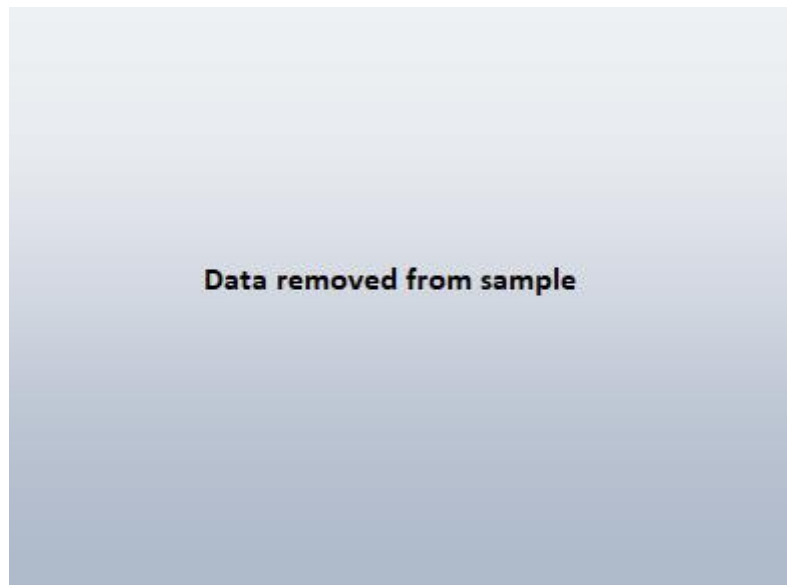
% retail value rsp Company	2017	2018	2019	2020	2021
	Data removed from sample				

Others
Total

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 LBN Brand Shares of Video Games: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
-----------------------------------	---------------	------	------	------	------



Others
Total

Others
Total

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 NBO Company Shares of Video Games Hardware: % Value 2017-2021

% retail value rsp Company	2017	2018	2019	2020	2021
-------------------------------	------	------	------	------	------

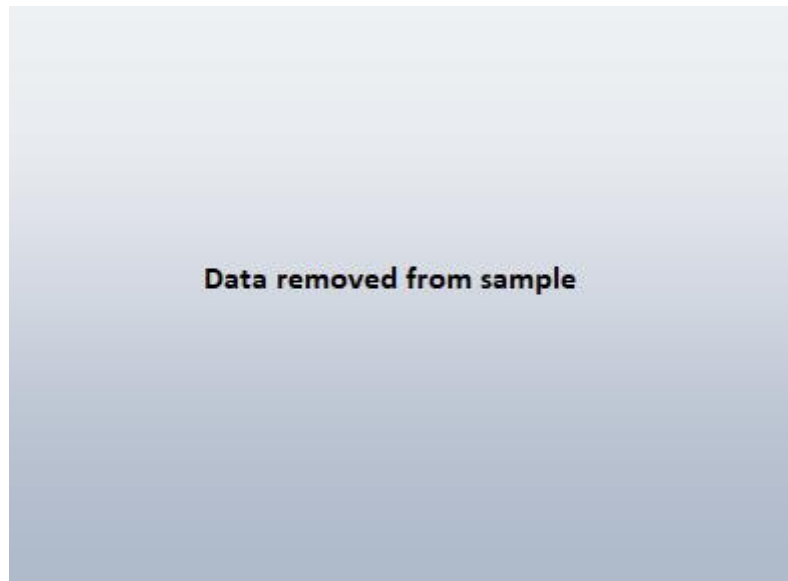


Others
Total

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 LBN Brand Shares of Video Games Hardware: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
-----------------------------------	---------------	------	------	------	------



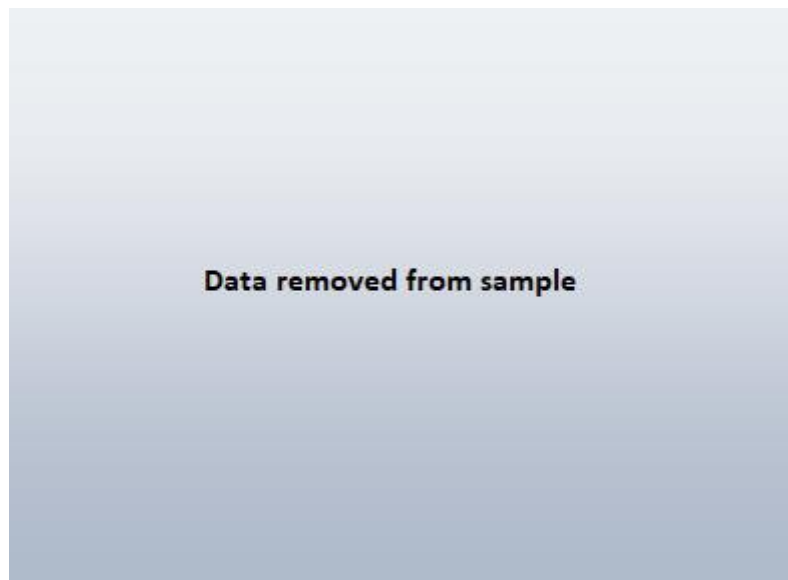
Others
Total

Others
Total

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 NBO Company Shares of Video Games Software: % Value 2017-2021

% retail value rsp Company	2017	2018	2019	2020	2021
-------------------------------	------	------	------	------	------



Others
Total

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 Distribution of Video Games by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional Grocery Retailers						
- Mixed Retailers						
-- Department Stores						
-- Mass Merchandisers						
-- Variety Stores						
-- Warehouse Clubs						
- Non-Grocery Specialists						
-- Electronics and Appliance Specialist Retailers						
-- Health and Beauty Specialist Retailers						
-- Home and Garden Specialist Retailers						
-- Leisure and Personal Goods Specialist Retailers						
--- Sports goods stores						
--- Traditional Toys and Games Stores						
--- Media Products Stores						
-- Other Non-Grocery Specialists						
Non-Store Retailing						
- Vending						
- Homeshopping						
- E-Commerce						
- Direct Selling						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 9 Distribution of Video Games Hardware by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
--------------------	------	------	------	------	------	------

- Store-Based Retailing
 - Grocery Retailers
 - Modern Grocery Retailers
 - Convenience Stores
 - Discounters
 - Forecourt Retailers
 - Hypermarkets
 - Supermarkets
 - Traditional Grocery Retailers
 - Mixed Retailers
 - Department Stores
 - Mass Merchandisers
 - Variety Stores
 - Warehouse Clubs
 - Non-Grocery Specialists
 - Electronics and Appliance Specialist Retailers
 - Health and Beauty Specialist Retailers
 - Home and Garden Specialist Retailers
 - Leisure and Personal Goods Specialist Retailers
 - Sports goods stores
 - Traditional Toys and Games Stores
 - Media Products Stores
 - Other Non-Grocery Specialists
- Non-Store Retailing
 - Vending
 - Homeshopping
 - E-Commerce
 - Direct Selling
- Total



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 10 Distribution of Video Games Software by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional Grocery Retailers						
- Mixed Retailers						
-- Department Stores						
-- Mass Merchandisers						
-- Variety Stores						
-- Warehouse Clubs						
- Non-Grocery Specialists						
-- Electronics and Appliance Specialist Retailers						
-- Health and Beauty Specialist Retailers						
-- Home and Garden Specialist Retailers						
-- Leisure and Personal Goods Specialist Retailers						
--- Sports goods stores						
--- Traditional Toys and Games Stores						
--- Media Products Stores						
-- Other Non-Grocery Specialists						
Non-Store Retailing						
- Vending						
- Homeshopping						
- E-Commerce						
- Direct Selling						
Total						

- Mixed Retailers
- Department Stores
- Mass Merchandisers
- Variety Stores
- Warehouse Clubs
- Non-Grocery Specialists
- Electronics and Appliance Specialist Retailers
- Health and Beauty Specialist Retailers
- Home and Garden Specialist Retailers
- Leisure and Personal Goods Specialist Retailers
- Sports goods stores
- Traditional Toys and Games Stores
- Media Products Stores
- Other Non-Grocery Specialists
- Non-Store Retailing
- Vending
- Homeshopping
- E-Commerce
- Direct Selling
- Total



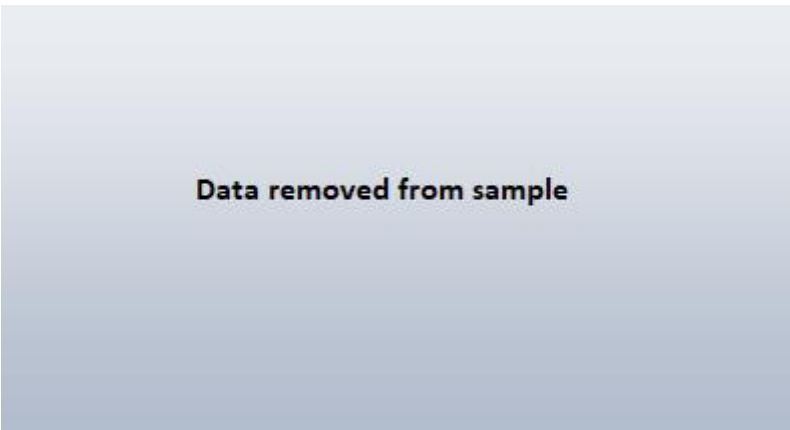
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 11 Distribution of Video Games Software (Physical) by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing						
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional Grocery Retailers						
- Mixed Retailers						
-- Department Stores						
-- Mass Merchandisers						
-- Variety Stores						
-- Warehouse Clubs						
- Non-Grocery Specialists						
-- Electronics and Appliance Specialist Retailers						
-- Health and Beauty Specialist Retailers						
-- Home and Garden						



- Specialist Retailers
- Leisure and Personal Goods Specialist Retailers
- Sports goods stores
- Traditional Toys and Games Stores
- Media Products Stores
- Other Non-Grocery Specialists
- Non-Store Retailing
- Vending
- Homeshopping
- E-Commerce
- Direct Selling
- Total



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 12 Distribution of Video Games Software (Digital) by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional Grocery Retailers						
- Mixed Retailers						
-- Department Stores						
-- Mass Merchandisers						
-- Variety Stores						
-- Warehouse Clubs						
- Non-Grocery Specialists						
-- Electronics and Appliance Specialist Retailers						
-- Health and Beauty Specialist Retailers						
-- Home and Garden Specialist Retailers						
-- Leisure and Personal Goods Specialist Retailers						
--- Sports goods stores						
--- Traditional Toys and Games Stores						
--- Media Products Stores						
-- Other Non-Grocery Specialists						
Non-Store Retailing						
- Vending						

- Homeshopping
- E-Commerce
- Direct Selling
- Total

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 13 Forecast Sales of Video Games by Category: Value 2021-2026

THB million	2021	2022	2023	2024	2025	2026
Video Games Hardware	Data removed from sample					
- Hand-Held Consoles						
- Static Consoles						
- AR/VR Headsets						
Video Games Software						
- Video Games Software (Physical)						
-- Computer Games (Physical)						
-- Console Games (Physical)						
- Video Games Software (Digital)						
-- Computer Games (Digital)						
-- Console Games (Digital)						
-- Online Games						
-- Mobile Games						
- Video Games Software by Platform						
-- Console Games						
-- Computer Games						
-- Online Games						
-- Mobile Games						
- Video Games Software by Format						
-- Video Games Software (Game Sales)						
-- Video Games Software (In-Game Purchases)						
Video Games						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 14 Forecast Sales of Video Games by Category: % Value Growth 2021-2026

% constant value growth	2021/2022	2021-26 CAGR	2021/26 Total
Video Games Hardware	Data removed from sample		
- Hand-Held Consoles			
- Static Consoles			
- AR/VR Headsets			
Video Games Software	Data removed from sample		
- Hand-Held Consoles			
- Static Consoles			
- AR/VR Headsets			

- Video Games Software (Physical)
 - Computer Games (Physical)
 - Console Games (Physical)
 - Video Games Software (Digital)
 - Computer Games (Digital)
 - Console Games (Digital)
 - Online Games
 - Mobile Games
 - Video Games Software by Platform
 - Console Games
 - Computer Games
 - Online Games
 - Mobile Games
 - Video Games Software by Format
 - Video Games Software (Game Sales)
 - Video Games Software (In-Game Purchases)
- Video Games

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

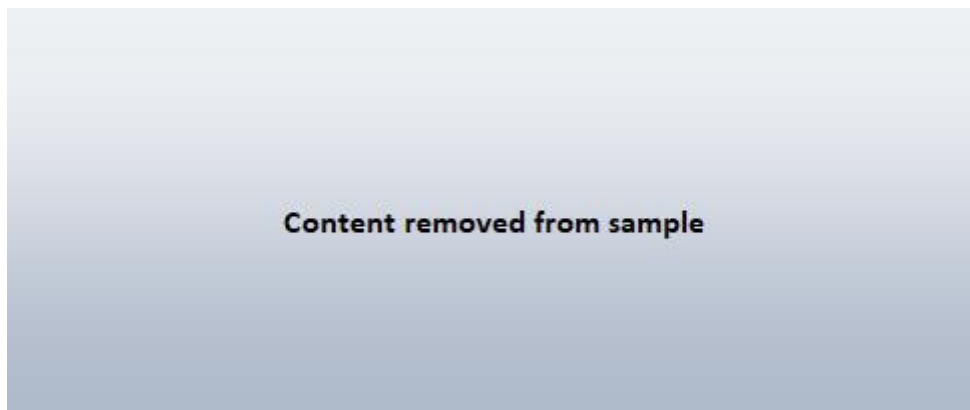


TOYS AND GAMES IN THAILAND - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

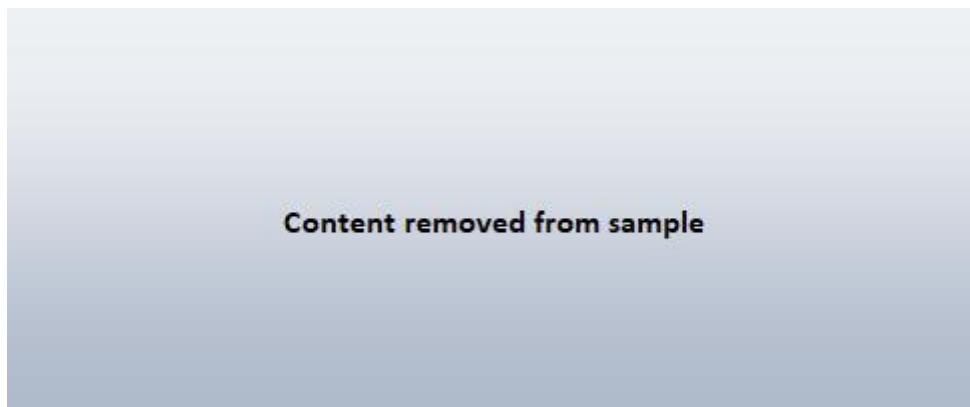
Toys and games in 2021: The big picture

Video games continued to significantly outperform traditional toys and games during 2021...



2021 key trends

Apart from the pandemic, demographic factors are also a negative on demand for traditional toys and games...



Competitive landscape

Hasbro (Thailand) maintained its lead in traditional toys and games in value terms in 2021...

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Retailing developments

E-commerce is now established as a mainstream distribution channel for traditional toys and games...

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What next for toys and games?

The rate of growth in retail constant value sales of traditional toys and games will accelerate sharply...

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MARKET DATA

Table 15 Sales of Toys and Games by Category: Value 2016-2021

THB million	2016	2017	2018	2019	2020	2021
Traditional Toys and Games	Data removed from sample					
Video Games						
Toys and Games						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 16 Sales of Toys and Games by Category: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Traditional Toys and Games	Data removed from sample		
Video Games			
Toys and Games			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 17 NBO Company Shares of Toys and Games: % Value 2017-2021

% retail value rsp Company	2017	2018	2019	2020	2021
Data removed from sample					

Others
Total

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 18 LBN Brand Shares of Toys and Games: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
-----------------------------------	---------------	------	------	------	------



Total Total

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 19 Distribution of Toys and Games by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
--------------------	------	------	------	------	------	------

- Store-Based Retailing
- Grocery Retailers
- Modern Grocery Retailers
- Convenience Stores
- Discounters
- Forecourt Retailers
- Hypermarkets
- Supermarkets
- Traditional Grocery Retailers
- Mixed Retailers
- Department Stores
- Mass Merchandisers
- Variety Stores
- Warehouse Clubs
- Non-Grocery Specialists
- Electronics and Appliance Specialist



- Retailers
- Health and Beauty Specialist Retailers
- Home and Garden Specialist Retailers
- Leisure and Personal Goods Specialist Retailers
- Sports goods stores
- Traditional Toys and Games Stores
- Media Products Stores
- Other Non-Grocery Specialists
- Non-Store Retailing
- Vending
- Homeshopping
- E-Commerce
- Direct Selling
- Total



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 20 Forecast Sales of Toys and Games by Category: Value 2021-2026

THB million	2021	2022	2023	2024	2025	2026
Traditional Toys and Games	Data removed from sample					
Video Games						
Toys and Games						

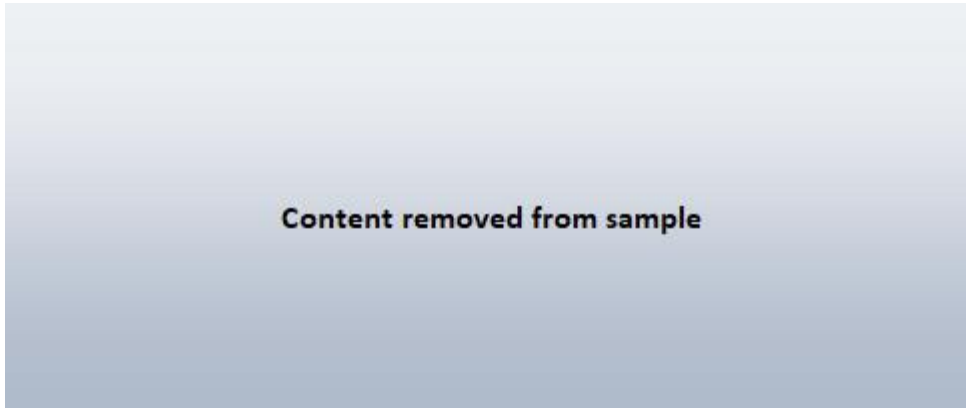
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 21 Forecast Sales of Toys and Games by Category: % Value Growth 2021-2026

% constant value growth	2021/2022	2021-26 CAGR	2021/26 Total
Traditional Toys and Games	Data removed from sample		
Video Games			
Toys and Games			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

DISCLAIMER



SOURCES

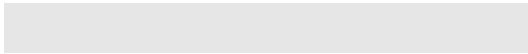
Sources used during research include the following:

Summary 1 Research Sources

Trade Associations



Trade Press



Source: Euromonitor International

