

Toys and Games in Western Europe

August 2023

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REGIONAL OVERVIEW

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

Western Europe recorded only sluggish growth over 2017-2022 as a whole

Positive growth expected after the declining sales seen in 2022

Video games outselling traditional toys and games in most markets

Plush bucks the declining traditional toys and games trend in the UK in 2022

Video games responsible for all the new sales added in toys and games in 2017-2022

Supply chain problems hit sales of video games hardware

Sustainability becoming an increasingly important consideration in toys and games

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

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

Specialist outlets remain an important channel in traditional toys and games

LEADING COMPANIES AND BRANDS

Increasing concentration in the UK over the historic period

Supply chain issues hit Sony's share in 2022

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

Evergreen and ever-inventive Lego brand tops the rankings

FORECAST PROJECTIONS

Growth incoming over the forecast period, but at relatively modest rates

AR/VR headsets and online games and subscriptions set for dynamic growth

"Kidults" consumer segment will continue gaining in importance over the forecast period

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France: Competitive and Retail Landscape

Germany: Market Context

Germany: Competitive and Retail Landscape

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