INTRODUCTION
Scope
Key findings

REGIONAL OVERVIEW
Video games now very much the dominant force in overall toys and games
Asia Pacific houses the biggest regional toys and games market
Positive growth expected after the dip in sales seen in 2022
Video games strongly outselling traditional toys in games in most markets
India leads the way in terms of video games growth over 2017-2022
Video games responsible for all the new sales added in toys and games in 2017-2022
Issuing of fewer video game licences and COVID-19 hit Chinese toys and games sales in 2022
Trading card craze helps games and puzzles to continue recording strong growth in Japan
E-commerce the dominant channel for sales of toys and games
Most video games sales, particularly software, are now through the online channel
Specialist outlets still have a role to play in traditional toys and games

LEADING COMPANIES AND BRANDS
Increasing concentration in China, the region’s major market
Top three players gaining share over 2017-2022
China the main revenue generator for more than half of the top 10 players
Pop Mart’s upward movement flattens in recent years after earlier dynamism

FORECAST PROJECTIONS
Growth expected throughout the forecast period for Asia Pacific’s toys and games market
Forecast period growth to be slower than in 2017-2022 due to Chinese regulations
India and Indonesia expected to see dynamic growth over the forecast period

COUNTRY SNAPSHOTs
China: Market Context
China: Competitive and Retail Landscape
Hong Kong, China: Market Context
Hong Kong, China: Competitive and Retail Landscape
India: Market Context
India: Competitive and Retail Landscape
Indonesia: Market Context
Indonesia: Competitive and Retail Landscape
Japan: Market Context
Japan: Competitive and Retail Landscape
Malaysia: Market Context
Malaysia: Competitive and Retail Landscape
Philippines: Market Context
Philippines: Competitive and Retail Landscape
Singapore: Market Context
Singapore: Competitive and Retail Landscape
South Korea: Market Context
South Korea: Competitive and Retail Landscape
Taiwan: Market Context
Taiwan: Competitive and Retail Landscape
Thailand: Market Context
Thailand: Competitive and Retail Landscape
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