

# Toys and Games in Western Europe

July 2024

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## 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

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France: Competitive and Retail Landscape

Germany: Market Context

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