



Traditional Toys and Games in Western Europe

August 2022

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INTRODUCTION

Scope

Key findings

REGIONAL OVERVIEW

High disposable incomes drive sales of toys in Western Europe

COVID-19 lockdowns fuel interest in traditional toys and games

Activity-based toys in high demand across all countries

Dynamic performance due to increased interest in a wider variety of toys

Games and puzzles, and construction see the largest absolute growth

Need for at-home activities and nostalgia stimulate growth (1)

Need for at-home activities and nostalgia stimulate growth (2)

COVID-19 forces traditional toys and games to go online

LEADING COMPANIES AND BRANDS

Well-established market leaders become stronger

LEGO strengthens its position as the leading toy manufacturer

Companies have a rather fragmented geographical coverage

Leading brands retain their top positions

FORECAST PROJECTIONS

Growth in Western Europe expected to be marginal

Continued focus on both children and kidult demographics

COUNTRY SNAPSHOTS

Germany: Market context

Germany: Competitive and retail landscape

UK: Market context

UK: Competitive and retail landscape

France: Market context

France: Competitive and retail landscape

Italy: Market context

Italy: Competitive and retail landscape

Spain: Market context

Spain: Competitive and retail landscape

The Netherlands: Market context

The Netherlands: Competitive and retail landscape

Switzerland: Market context

Switzerland: Competitive and retail landscape

Sweden: Market context

Sweden: Competitive and retail landscape

Turkey: Market context

Turkey: Competitive and retail landscape

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