

The European market potential for outdoor games and toys

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Europe is an interesting market for outdoor games and toys. Play is a fundamental human need, and European imports of games and toys have increased. Most Europeans have access to a garden or another outdoor area. A growing interest in green outdoor spaces and plants may boost consumer demand for outdoor products. In addition, when budgets are tight, playing outside is an affordable option. To appeal to European consumers, you can add value with design, craftsmanship and sustainable elements.

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1. Product description

In Home Decoration and Home Textiles (HDHT) there are several [categories consisting of various product groups](#) - including the category of games, toys, and hobby items. This study mainly focuses on outdoor games and toys that can be played in groups of two or more people (such as ballgames) and toys that imitate adult activities (such as cookery sets).

The following code is used to identify trade in outdoor games and toys:

Table 1: Product code

Harmonised System (HS)	Description
9503 00	Tricycles, scooters, pedal cars and similar wheeled toys; doll carriages; dolls; other toys; reduced-size 'scale' recreational models, working or not; puzzles of all kinds

Because no specific trade data are available for outdoor games and toys, this HS code covers a broad, general range of toys.

Functionality

Outdoor games and toys must be easy to understand or come with well-written rules/instructions. To facilitate storage and transport, they often come in simple bags. Durability and weather resistance are key for outdoor use. Repairability and the possibility to replace components can enhance the sustained functionality of the items.

Material

The most common materials for outdoor games and toys are synthetics, wood, and in some cases textiles. Sustainable alternative materials are increasingly replacing traditional plastics.

Design

Form often follows function in outdoor games and toys. Colours range from a bright and colourful palette for kids and younger players to natural tones or undyed and unvarnished for a more adult market.

Figure 1: Wooden ring toss game

Source: [BS TOYS @ YouTube](#)

Size

Sizes depend on the specific items and their use. Ball games and such need to correspond to the normal size and weight determined by the traditions of the game. For games that imitate adult activities, such as tea sets or miniature kitchens, sizes follow the average height of the target group (kids).

2. What makes Europe an interesting market for outdoor games and toys?

Europe is an interesting market for outdoor games and toys. An estimated [82% of Europeans have a garden or a balcony at home](#). In the October 2023 Maison&Objet Barometer, [74% of specifiers noted an increasing demand for green outdoor spaces/terraces](#) in residential projects. This offers opportunities. For example, [83% of French](#)

people with a garden use it to let their children play outside, and 72% use it for healthier physical activities. British gardeners spend £109 per year on garden toys on average, which is about one sixth of their total garden spending.

Because no specific trade data are available for outdoor games and toys, the following statistics cover games and toys.

Source: UN Comtrade

European imports of games and toys grew from €16 billion in 2019 to €18 billion in 2023. They peaked at €22 billion in 2022. This translates to an overall average annual rate (CAGR) of 2.5%. Imports from developing countries fluctuated before reaching €9.2 billion in 2023. As a result, their direct market share fluctuated at about 50% on average. During the COVID-19 pandemic in 2020 and 2021 their share was slightly lower, and since then it has become slightly higher.

The pandemic and the war in Ukraine have disrupted international trade, affecting the costs and availability of raw materials, energy and transport. At the same time, lockdowns have led to an increased focus on the home and garden. The pandemic also boosted trends like playfulness, wellness and 'home sweet home'. Outdoor games and toys fit in with this by providing consumers with an affordable way to relax, plus connect with nature and each other. This may – at least partially – compensate for the pressure that the [cost-of-living crisis](#) puts on consumer spending. For more drivers of demand, see the [section on trends](#).

Tip:

To appeal to European consumers, study and apply the trends in the market for outdoor games and toys – e.g. read the [section on trends](#) or visit the [Spielwarenmesse](#).

3. Which European countries offer the most opportunities for outdoor games and toys?

The larger Western European economies are the main importers of outdoor games and toys. However, importers in these countries generally sell their products across Europe. Your best strategy is therefore to focus on a particular segment rather than a specific country.

Because no specific trade data are available for outdoor games and toys, the following statistics cover games and toys.

Source: UN Comtrade

In 2023, Germany remained Europe's leading importer of games and toys with 18% of imports, followed by the

UK (13%) and France (12%). Smaller markets with a share of less than 10%, but still in the top-6 leading importing countries, are the Netherlands and Poland with 7.7% each, and Czechia with 6.6%.

Focus on segments

European countries have different roles in the HDHT market. Some are mainly importers and others are mainly manufacturers. Western European countries are mainly importers, and most Western European importers are re-exporters. They do not just sell their products in their own country, they distribute them across the continent. This explains why in HDHT, small countries like the Netherlands often import much more than they consume.

In terms of marketing, you should know that countries are not markets. The HDHT market consists of different segments, ranging from low- to high-end (check our [study on market entry for outdoor games and toys](#)). Every European country has these segments, although their size may vary. It therefore makes much more sense for you to focus on a segment in outdoor games and toys and connect with importers in that segment. These importers will then sell your products in that segment across Europe.

Consumer spending is under pressure

Outdoor games and toys sales are sensitive to economic cycles. When economic circumstances and prospects are down, consumers postpone buying items they do not urgently 'need'. When economic conditions are good, purchases of such non-essential products tend to rise.

[European consumer confidence fell sharply in March 2022](#) due to the situation in Ukraine and the subsequent energy crisis. Although it has improved since then, consumer confidence still scores below its long-term average. This may well lead to lower spending.

Source: OECD

Before the COVID-19 pandemic, consumer spending ('private consumption expenditure') in the leading European markets grew by about 1-3% per year. Due to the pandemic, 2020 broke this trend. In 2021, growth bounced back into positive figures. Forecasts for 2024-2025 are modest, reflecting consumer confidence.

Germany: Europe's largest importer

Europe's leading importer of games and toys is Germany. Imports grew from €3.0 billion in 2019 to €3.2 billion in 2023, at an average annual rate (CAGR) of 1.7%. This included a peak of €3.9 billion in 2022.

Imports from developing countries grew from €1.4 billion in 2019 to €1.9 billion in 2023, at a CAGR of 8.0%. As a result, these countries' direct import market share grew from 40% to 58%. This is considerably above the European average. Although most of this comes from China (47% in 2023), countries like Vietnam (3.2%), Indonesia (2.0%) and Tunisia (1.3%) also perform well.

About 85% of Germans are estimated to have a garden or balcony at home. Combined with Germany's role as a trade hub, this potentially large domestic market makes the country an interesting market for outdoor games and toys.

Brexit may boost direct trade with the United Kingdom

British imports of games and toys were relatively stable at about €2.4 billion, except for a strong peak of €3.1 billion in 2022. Imports from developing countries grew from €1.7 billion in 2019 to €1.9 billion in 2023, at

a CAGR of 2.4%. As a result, their direct import market share grew from 69% to 76% – the largest in Europe. China is the UK's leading supplier with 66% in 2023, followed by Czechia (7.8%), Hungary (5.5%), Vietnam (4.8%) and Indonesia (2.4%).

Brexit may stimulate direct imports from developing countries, allowing British buyers to avoid additional fees now that they are no longer part of the EU's single market. In addition, 91% of Brits are estimated to have a garden or balcony at home. Altogether, this makes the UK a promising market for outdoor games and toys.

France: modest market share for developing countries

After some fluctuations, France's imports of games and toys reached €2.2 billion in 2023. This translated into a CAGR of 1.7% between 2019 and 2023. An estimated 81% of French people have a garden or balcony at home, making France an interesting market for outdoor games and toys.

Imports of games and toys from developing countries have dropped since the COVID-19 pandemic in 2020, when France turned to European trade hubs like Belgium, Germany and the Netherlands. Their direct import market share declined from 61% in 2019 to 28% in 2020. Since then, they have recovered to about 35%, although this remains below the European average. The decline did come mainly from France's leading supplier China – from 56% in 2019 to 30% in 2023. At the same time, smaller suppliers like Vietnam (1.8%) and Indonesia (1.2%) performed well.

The Netherlands: key trade hub

The Netherlands is another important European trade hub. This could make the country an interesting market for you. Dutch imports of games and toys grew from €1.2 billion in 2019 to €1.4 billion in 2023, at an average annual rate (CAGR) of 4.7%. This included a peak of €1.8 billion in 2022.

Over 50% of these imports came directly from developing countries, which is comparable to the European average. Most of this comes from China (43% in 2023). Vietnam (4.8%) also performs well. An estimated 95% of Dutch people have a garden or balcony at home, which is the highest share in Europe. This offers opportunities for outdoor games and toys.

Poland: strong emerging market

Poland's growing imports have made the country a leading European importer of games and toys. They grew from €995 million in 2019 to €1.4 billion in 2023, at a strong CAGR of 8.9%.

Imports of games and toys from developing countries grew from €509 million in 2019 to €730 million in 2023, at a CAGR of 9.5%. With 52% in 2023, their direct import market share is comparable to the European average. Most of this comes from China (45% in 2023). Countries like Vietnam (2.7%) and Indonesia (1.4%) have also increased their supplies to Poland. In addition, 82% of Polish people are estimated to have a garden or balcony at home. As the Polish market continues to mature, it may offer opportunities for outdoor games and toys.

Czechia: emerging Eastern European market

Czechia is another upcoming Eastern European market. Its imports of games and toys grew from €1.0 billion in 2019 to €1.2 billion in 2023, at a CAGR of 4.3%.

The direct import market share for developing countries rose from 30% (€337 million) in 2019 to 42% (€496 million) in 2023, which is promising. Although most of it comes from China (30% in 2023), countries like Indonesia (5.7%), Vietnam (1.6%), Malaysia (1.3%) and Mexico (1.2%) also perform well. With an estimated 76% of Czech people having a garden or balcony at home, this maturing market may offer potential for outdoor games and toys.

Tip:

Do not just focus on specific European countries. Instead, identify the appropriate segment and let your buyers distribute your products across Europe within this segment.

4. Which trends offer opportunities or pose threats in the European outdoor games and toys market?

The market for outdoor games and toys is shaped by various trends, often related to the [trends for HDHT](#) on a sector level. Key topics are playfulness, 'home sweet home', wellness and sustainability. Aspects of these trends are connected.

Playfulness: a basic human need

Play is a deeply rooted human desire, bringing the consumer into a light-hearted, relaxed mood. People play to have fun and fulfil their need for optimism, escape and invention. It stimulates social connection, reducing loneliness and isolation and providing a distraction from worries. Today's consumers – both young and old – play a lot. They do so in private as well as in public places, both indoors and outdoors.

[Play strongly connects to three human priorities](#): a stress-free and happy life, children's self-love and advocacy, and connection and family togetherness. As such, playing is closely related to happiness and mental wellness. Nearly all parents say that their child's happiness is at least somewhat related to how much or how often they play. Children agree, as 90% say they always or sometimes feel happier when they play. Encouragingly, 51% of parents spend more time playing with their children now than a few years ago. And 21% spend more time playing together as a family. And yet, most parents would like to have more time to play with their child.

Combined with the popularity of the garden and other outdoor spaces, the desire to play comes with an increased interest in outdoor games and toys. This offers opportunities.

Tips:

If you offer outdoor games and toys, consider expanding into playthings for indoor or multifunctional use.

If you are new to this category, be aware of the strict safety standards and other requirements that toys must meet. For more information, check our [study on market entry for outdoor games and toys](#).

Home sweet home: spending quality time together

The 'home sweet home' trend involves people (across generations) enjoying each other's company, entertaining, cooking and dining, or simply relaxing. Core to this is the idea of 'cocooning' – the need to surround yourself with people and things you love, inside the warmth and familiarity of your own home. This also applies to the garden and balcony, which have become an extension of the home. Playing together (e.g. games) allows people to connect and have fun together.

Both adults and children consider play [a way to escape from pressure and stress and increase happiness and wellbeing](#). Increasingly, the home (and its outdoor space) is the key place for leading a more playful life. It should be a safe and comforting space that meets their needs for increased mental wellbeing, self-love and

family togetherness.

Tips:

Offer games and toys that can be played (with) together and facilitate connection.

Develop concepts that appeal to consumers of various generations.

Wellness: closer to nature

Wellness is a dominant consumer trend. European consumers are constantly trying to improve themselves, both in body and mind. [Two-thirds of consumers are more conscious of looking after their physical/mental health](#) than they were before the COVID-19 pandemic. [Over 67% of people worldwide say they make wellbeing a top priority](#), and [89% were taking more action to improve it in 2024 than they were one year back](#).

Urban consumers getting in touch with nature is a key part of the wellness trend. [Spending time in nature makes them feel healthier](#), and living a sustainable lifestyle provides physical, mental and emotional benefits. In addition, [wellbeing increases by 18% when people spend time in nature or the outdoors with others](#).

Playing outside – in the garden, in a park, at the beach – fits in well with this, providing a fun way to relax and connect with nature. Outdoor toys and games can also contribute to mental wellness by facilitating self-expression and interaction with others, and by improving skills. In 2024, [European consumers said they expected to spend more on categories like home improvement and gardening supplies, as well as sports and outdoor equipment](#).

Tip:

Communicate the added value of your outdoor game or toy to consumers' physical and mental wellness in your marketing.

Sustainability: people and planet

Both the HDHT industry and consumers are becoming more concerned about the environmental and societal effects of production and consumption. Sustainability is quickly becoming a central consumer need, also in HDHT. European consumers are increasingly adopting more sustainable lifestyles. The COVID-19 pandemic has boosted this trend. At the same time, the current cost-of-living crisis drives the need for sustainable products to be affordable.

Especially for younger generations, [the pandemic has made it more important for consumers and companies to improve sustainability](#). An impressive [86% of European consumers consider sustainability very important](#); 29% deliberately and consciously buy sustainable products. In addition, [most people want significant change to make the world fairer and more sustainable after COVID-19](#). Millennials and Gen Z will soon be the dominant generation of consumers. They care about sustainability and express this by buying products (and from companies) that contribute to a better world.

Outdoor games and toys fit in well with this trend, as parents need safe products for their children. This is often

associated with natural (organic) materials, water-based paints and dyes, and other sustainable characteristics. For example, [about 60% of British adults consider it very important for toys and play equipment made from forest-based materials like wood to come from sustainable sources.](#)

Figure 5: Nordic Swan certified sand set of sugarcane bioplastic

Source: [dantoy @ YouTube](#)

For outdoor games and toys, key topics regarding social and environmental sustainability include:

- Materials: Are your materials renewable? Are they traceable and responsibly traded?
- Production process: Does production take place in a safe and healthy way? Are your labour contracts fair? Can you reduce your energy use? Can you prevent water, air and soil pollution? Can you reuse waste, either inside the production system or elsewhere? In general, can you ensure low-impact production?
- Transport: Do you use clean transport options? Do you pack containers effectively? Are your packing materials recyclable?

At the level of material use, there are lots of options based on recycling post-industrial or post-consumer waste. This can go from recycled plastics to reclaimed wood, or leftover fabric or wood. Potentially damaging materials such as plastic can also be replaced by 'new plastics' made from eco-friendly materials (bioplastics).

Tips:

Use sustainable solutions for raw materials, production, transport and distribution, consumer use and waste disposal.

Clearly communicate your sustainable values and practices through your marketing materials. These do not need to be perfect, but giving your buyers specific information can help them greatly.

If your products have a unique origin and/or story, communicate the special techniques, materials, producers, processes or meanings. This may add value to your concept and that of your buyer.

If your importer is interested, consider certification. For more information on this and relevant sustainability legislation, read our studies on [market entry for outdoor games and toys](#) and [buyer requirements for HDHT](#).

For more information, check our special [study on sustainability in HDHT](#), our [tips to go green](#) and [tips to become socially responsible](#), and our webinars on [sustainability in the European HDHT market](#) and [sustainable innovations for your HDHT business](#).

Example of company

[Lanka Kade](#) specialises in educational wooden toys that inspire younger children to learn through play. Their games and toys are handcrafted by over 160 artisans in Sri Lanka, part of 10 independent artisan groups. They come in bright and bold colours, as well as natural wood finishes.

Figure 6: Wooden fairy toy

The company is committed to both environmental and social sustainability. Their games and toys are made from sustainably sourced Sri Lankan wood from exhausted rubber trees. As an FSC chain-of-custody certified organisation, Lanka Kade increasingly uses FSC-certified wood. In addition, they aim to reduce poverty through trade and work according to WFTO's [10 principles of fair trade](#). Lanka Kade's Educational Foundation provides books and daily milk drinks for children at several rural schools in Sri Lanka.

[Globally Cool](#) carried out this study in partnership with GO! GoodOpportunity and Remco Kemper on behalf of CBI.

Please review our [market information disclaimer](#).