

# Entering the European market for outdoor games and toys

Last updated:  
25 March 2025

The European market for outdoor games and toys offers opportunities, but competition is strong. The mid- to high-end segments are your best options, as mass-produced items dominate the lower ends of the market. To compete, add value to your products through your design, craftsmanship and sustainability. You must comply with mandatory (legal) requirements, as well as any additional requirements your buyers may have.

## Contents of this page

1. [What requirements must outdoor games and toys meet to be allowed on the European market?](#)
2. [Through which channels can you get outdoor games and toys on the European market?](#)
3. [What competition do you face on the European outdoor games and toys market?](#)
4. [What are the prices of outdoor games and toys on the European market?](#)

## 1. What requirements must outdoor games and toys meet to be allowed on the European market?

The following requirements apply to outdoor games and toys in the European market. For a more detailed overview, check our study on [buyer requirements for Home Decorations and Home Textiles \(HDHT\)](#).

### What are the mandatory requirements?

When exporting to Europe, you have to comply with the following legal requirements:

- Toy Safety Directive
- General Product Safety Directive/Regulation
- Restricted chemicals: REACH
- Intellectual property rights
- Textile Regulation
- Timber/Deforestation Regulation
- Packaging legislation
- Upcoming sustainability legislation

### Toy Safety Directive

The [Toy Safety Directive](#) (2009/48/EC) sets safety criteria for toys to be marketed in the European Union (EU). It defines toys as 'products designed or intended, whether or not exclusively, for use in play by children <14 years of age'. Various [harmonised standards for toy safety](#) clarify what is deemed 'safe'. Adhering to them can help you comply. Annex V of the Directive specifies warnings and indications of precautions that must be provided with certain categories of toys, such as toys that are not intended for use by children under 36 months. Instructions and safety information must be in a language or languages easily understood by consumers.

When a product meets the requirements, the manufacturer must draw up a [Declaration of Conformity](#) (Annex III) and the necessary [technical documentation](#) (Annex IV). Then they must add [CE marking](#). In 2024, the [European Parliament supported an initiative to convert the directive into a regulation](#). The proposed regulation introduces Digital Product Passports for toys in line with the new [Ecodesign for Sustainable Products Regulation](#).

Tips:

Study the [Toy Safety Directive](#).

For more information, see the EU [brochure](#) and [guidance documents](#) on toy safety.

Seek guidance on [how to draw up the technical documentation and a declaration of conformity](#).

Follow the steps outlined at [CE Marking for Manufacturers](#) and study the factsheet on [CE marking for the toy industry](#).

Stay updated on the [proposal for a new safety regulation](#).

## General Product Safety Directive/Regulation

All non-food products marketed in the European Union (EU) must be safe to use. The current [General Product Safety Directive](#) (GPSD, 2001/95/EC) will be replaced by the [General Product Safety Regulation](#) (GPSR, EU 2023/988), which came into force in June 2023 and will apply from December 2024 onwards. The GPSR ensures that products comply with the highest safety requirements, whether sold online or in traditional shops.

Unsafe products are either rejected at the European border or withdrawn from the market. The EU uses the [Safety Gate](#) system to list and share information about such products.

Tips:

Study the new [GPSR](#).

Use your common sense to ensure that normal use of your product does not cause any danger.

To get an idea of potential issues, search the [Safety Gate alerts](#) for outdoor games and toys.

## Restricted chemicals: REACH

The [REACH](#) regulation (EC 1907/2006) lists restricted chemicals in products that are marketed in Europe. Restricted chemicals in the production of outdoor games and toys include arsenic and creosotes as wood preservatives.

Tips:

Comply with the restrictions as laid down in [REACH](#).

Explore information and tips from the European Chemical Agency (ECHA), like its [list of all restricted](#)

[chemicals](#) (REACH Annex XVII), [information for non-EU companies](#), and [questions & answers](#) (Q&A).

## Intellectual property rights

When developing products, do not copy an existing design. [Intellectual property \(IP\) is protected in Europe](#), and products that violate IP rights are banned from the market.

Tip:

For more information, visit the [European Union Intellectual Property Office](#) (EUIPO) and the [World Intellectual Property Office](#) (WIPO).

## European Green Deal

The [European Green Deal](#) provides a legal aspect to social and environmental sustainability. Its [Circular Economy Action Plan](#) includes initiatives along products' entire life cycle.

In this context, many European laws are under revision and new legislation is being developed. Some of this will apply to you directly, and some indirectly via your buyers. Particularly relevant proposals for outdoor games and toys include:

- Textile Regulation
- Corporate Sustainability Due Diligence Directive
- Forced Labour Regulation
- Packaging and Packaging Waste Regulation
- Green Claims Directive

## Textile Regulation

The EU's [Textile Regulation](#) (1007/2011) states that textile products must be labelled or marked. This applies to products containing  $\geq 80\%$  textile fibres. These products must have a label stating their full fibre composition and, if applicable, the presence of non-textile parts of animal origin. The label must be durable, easily legible, visible and accessible. It should be printed in all official national languages of the European countries where the product is sold. The European Commission plans to revise the regulation in 2024 to introduce specifications for physical and digital labelling of textiles, including sustainability and circularity parameters based on the new [Ecodesign for Sustainable Products Regulation](#).

There is no EU-wide legislation on symbols for washing instructions and other care aspects of textile items. To give consumers clear information, follow the [ISO 3758:2023](#) standard for graphic symbols in care labelling.

Tips:

For more information about the [Textile Regulation](#), see the [Frequently Asked Questions \(FAQ\)](#).

Know your products and how they should be labelled. Find out more about [textile labelling rules](#) from Access2Markets.

Stay updated on the [revision of the Textile Regulation](#).

## Corporate Sustainability Due Diligence Directive and Forced Labour Regulation

Important new Green Deal legislation includes the Corporate Sustainability Due Diligence Directive (CSDDD) and Forced Labour Regulation (FLR). In July 2024, the [CSDDD](#) (2024/1760) entered into force. It requires larger companies to identify and prevent, end or reduce any negative impacts of their activities on human rights and the environment, both in the company's own operations and in its value chains. This means that the new rules may apply to you indirectly via your buyers. In addition, the [proposed FLR](#) bans products made with forced labour.

The European Commission plans to issue a set of guidelines to help companies conduct due diligence.

Tips:

Read more about the [CSDDD](#) and explore the [FAQ](#).

See the FLR [Q&A](#) and [factsheet](#).

Stay updated on the proposed [rollout of the FLR](#).

The [Packaging Directive](#) (94/62/EC) aims to prevent or reduce the impact of packaging and packaging waste on the environment. Buyers may therefore ask you to minimise the use of packaging and/or use sustainable (recycled) materials.

According to the [Circular Economy Action Plan](#), all packaging on the European market should be reusable or recyclable in an economically viable way by 2030. To help achieve this, a new Packaging and Packaging Waste Regulation (PPWR) is being developed.

Europe also has [requirements for wood packaging material and dunnage](#) used for transport, like pallets. The goal is to prevent organisms that are harmful to plants or plant products from entering and spreading within the EU.

Tips:

For more information, see the EU's [packaging and packaging waste legislation](#) and [wood packaging material factsheet](#).

Stay updated on the [proposal for a new packaging and packaging waste regulation](#).

## Green Claims Directive

Another upcoming law is the Green Claims Directive. In a recent European screening of websites, [many green claims were believed to be exaggerated, false or deceptive](#). Via this 'greenwashing', companies pretend to be doing more for the environment than they really are.

In 2023, the [European Commission proposed a Green Claims Directive](#) to:

- Make green claims reliable, comparable and verifiable;
- Protect consumers from greenwashing;
- Contribute to a circular and green economy;
- Help establish a level playing field.

The proposal is currently pending. If/when the Directive is approved, any green claims (voluntary or otherwise) you or your buyer make about your product would have to follow [minimum requirements for substantiating, communicating and verifying environmental claims](#).

### Tips:

For details, see the [Q&A](#) and [factsheet](#).

Stay updated on the proposed [rollout of the Green Claims Directive](#).

For help with communicating your sustainable performance honestly and effectively, use the Netherlands' [guidelines regarding sustainability claims](#) and/or the British [guidance for businesses on making environmental claims](#).

## What additional requirements do buyers often have?

Buyers often have additional requirements on:

- Sustainability
- Labelling and packaging
- Payment and delivery terms

## Sustainability

Social and environmental sustainability are becoming increasingly important in the European HDHT market. Environmental sustainability focuses on your company's impact on the environment, for example via raw materials and production processes. Social sustainability focuses on your company's impact on the wellbeing of your workers and the community. Key topics include fair wages and safe working conditions.

You can highlight your sustainable activities and policies in the 'story' behind your product and company. Buyers appreciate good storytelling that evokes an emotional connection.

## Consumers value sustainability

The increasing importance of sustainability is reflected in a Maison&Objet Barometer from 2021, where [62% of HDHT retailers noticed growing interest from their customers in ethical products](#); 92% of the retailers indicated that their customers think natural materials are very important, 77% that they value socially responsible production methods, and 71% that they care about recyclable/recycled materials.

In addition to legal compliance, a growing number of European buyers would like you to comply with:

- [Business Social Compliance Initiative \(BSCI\)](#): an initiative of European retailers to improve social conditions in sourcing countries. They expect their suppliers to follow the [BSCI Code of Conduct](#).
- [Ethical Trading Initiative \(ETI\)](#): an alliance of companies, trade unions and voluntary organisations. ETI aims to improve working conditions in global supply chains via their [ETI Base Code of labour practice](#).
- [Sedex](#): a membership organisation striving to improve working conditions in global sourcing chains. The [Sedex platform](#) lets you share your sustainable performance, based on a self-assessment.

You can learn about sustainable options from standards like [ISO 14001](#) and [SA8000](#). However, most buyers do not require certification by either of these two standards. If you adhere to such initiatives and standards, this may help your buyers comply with the CSDDD and proposed FLR.

### Tips:

Optimise your sustainability performance. Study initiatives like [BSCI/ETI](#) to learn what to focus on.

Demonstrate your sustainability performance for a competitive advantage. You can use self-assessments like that of the [Sedex platform](#), or a code of conduct such as the [ETI Base Code](#).

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](#).

Read more about [BSCI](#), [ETI](#), [Sedex](#) and [SA8000](#) in the ITC Standards Map. You can also conduct a [free online self-assessment](#).

## Labelling

The information on the outer packaging of the product should match the packing list sent to the importer.

Outer packaging labels should include:

- Producer name
- Consignee name
- Quantity
- Size
- Volume
- Caution signs

Your buyer will specify what information they need on the product labels or items, such as logos or 'made in' information. This is part of the order specifications. In Europe, [EAN or barcodes](#) are commonly used on the product label.

## **Packaging specifications**

### **Importer specifications**

Pack outdoor games and toys according to the importer's instructions. They have their own requirements for packaging materials, filling boxes, palletisation and stowing containers. Always ask for the importer's order specifications, which are part of the purchase order.

### **Damage prevention**

Proper packaging minimises the risk of damage caused by shocks. How an item is packaged for export depends on how easily it can be damaged. Packaging should ensure that the items inside a box cannot damage each other. It should also prevent damage to the boxes when they are stacked inside the container. Packaging therefore usually consists of inner and outer cardboard boxes. The inner boxes are filled with protective materials or clever partitioning with corrugated cardboard.

If you produce wooden objects, dry them properly to prevent mould or cracks. Condensation inside the container during transport can also cause mould. Good ventilation can prevent this, so you must inspect containers for air holes before shipment. You can also place products that reduce humidity amongst the cargo. Make sure to follow the importer's instructions.

### **Dimensions and weight**

Packaging must be easy to handle in terms of size and weight. Standards are often related to labour regulations at the point of destination and must be specified by the buyer.

### **Cost reduction**

Boxes are usually palletised for transport, and the use of pallet space should be maximised. Nesting or stacking can reduce costs. Consider this when designing your products.

While packaging must provide maximum protection, excess materials or shipping 'air' should be avoided. Waste removal is a cost for buyers.

You can reduce the amount and diversity of packing materials by:

- Partitioning inside the boxes, using folded cardboard;
- Matching inner and outer boxes by using standard sizes;
- Considering packing and logistical requirements when designing your products;
- Asking your buyer for alternatives.

### **Material**

Importers are increasingly banning wooden crating and packaging. Economical and sustainable packaging materials are more popular. Using biodegradable materials such as paper-based alternatives can be a market opportunity. Some buyers may even demand it.

### **Consumer packaging**

Outdoor games and toys often come in simple cotton bags or plastic containers to keep the set together (like a pétanque game) and for easy storage and transport. As outdoor games and toys tend to be gifts, their packaging is usually colourful and attractively decorated.

Tips:

Always ask for the importer's order specifications, including their packaging/labelling requirements.

Visit [Packaging Europe](#) for more information on the latest packaging developments.

## Payment and delivery terms

Payment terms are usually confirmed in the buyer's order contract. They vary from buyer to buyer and depend on the volume and value of the order, the type of distribution partner, whether or not an agent is involved, and what delivery terms apply.

Delivery terms, known as [Incoterms](#), depend on the type of distribution partner. HDHT importers generally prefer Free On Board (FOB) or Free Carrier (FCA) arrangements.

Tips:

For more information, check our [tips to organise your export](#).

Study the different Incoterms, including your and your buyer's rights and obligations.

Read our study on [terms & conditions](#) for a more elaborate overview, how to work with them, and the benefits of having your own.

## What are the requirements for niche markets?

Fair-trade practices and sustainability certification are the most common niche market requirements.

### Fair trade

The concept of fair trade supports fair pricing and improved social conditions for producers and their communities. Fair-trade certification can give you a competitive advantage, especially if the production of your items is labour-intensive. It often includes aspects of environmental sustainability too.

Common fair-trade labels are the [World Fair Trade Organisation](#) (WFTO) Guarantee System and [Fair for Life](#) certification. For most fair-trade oriented buyers in Europe however, complying with WFTO's [10 principles of fair trade](#) is enough.

Tips:

Ask buyers what they are looking for. Especially in the fair-trade sector, you can use the story behind your product for marketing purposes.

Determine which label would be the best fit for you and apply if you can.

If certification is not feasible, work according to WFTO's [principles](#) without being officially guaranteed or certified. Carefully document your company processes so you can support your story.



Read more about [Fair for Life](#) in the ITC Standards Map.

## Sustainable wood

[FSC](#) certification is the most common label for sustainable wooden products. [FSC chain of custody certification](#) guarantees that a product's source material comes from responsibly managed forests. Non-timber forest products like rattan and bamboo can also be certified.

[PEFC](#) is another option. [PEFC chain of custody certification](#) also verifies that the forest-based material in a product comes from sustainably managed forests.

Figure 1: FSC-certified wooden mud kitchen

Source: [TP Toys @ YouTube](#)

## Sustainable textiles

Popular certifications for textiles include:

- [Global Organic Textile Standard](#) (GOTS) – a textile-processing standard for organic fibres that ensures environmental and social responsibility throughout the production chain.
- [OEKO-TEX](#) Standard 100 – certification that guarantees textile articles are free from harmful substances.

OEKO-TEX [Made in Green](#) combines Standard 100 and [STeP](#) to include environmental and social responsibility. Other options are the [EU Ecolabel](#) and the [Nordic Swan Ecolabel](#). Nordic Swan also certifies [toys](#) of other materials.

#### Tips:

Read more about [GOTS](#), OEKO-TEX [Standard 100](#) and [Made in Green](#), and the [EU Ecolabel](#) in the ITC Standards Map.

Explore the possibility of sourcing organic cotton. Textile products containing  $\geq 70\%$  organic fibres can be GOTS-certified. The easiest way is to use certified organic cotton yarn or fabric.

## Recycled materials

The [Global Recycle Standard](#) (GRS) is a standard for products containing recycled material, with criteria for environmentally friendly production and good working conditions. Products containing  $\geq 20\%$  recycled material can be GRS-certified, but only if the entire production process is certified. Additional social, environmental and chemical requirements must also be met. For consumer-facing labelling, the product must contain  $\geq 50\%$  recycled content. If you use GRS-certified material, you can highlight in your communication that this material is certified.

Similarly, the Recycled Claim Standard (RCS) is intended for products containing  $\geq 5\%$  recycled material. Unlike the GRS, the RCS does not address social or environmental aspects of processing and manufacturing.

#### Tips:

Check for GRS/RCS-certified versions of the materials you use, as an alternative or addition.

Carefully check the specifications of the available certified materials. Sometimes composition changes due to the recycling process.

When using GRS/RCS-certified materials, refer to this correctly in your communications.

Read more about the [GRS](#) and [RCS](#) in the ITC Standards Map.

## 2. Through which channels can you get outdoor games and toys on the European market?

Outdoor games and toys are put on the European market through importers/wholesalers that supply to retailers, as well as retailers that buy directly from suppliers. The market consists of low-, mid- and high-end (premium) segments.

### How is the end market segmented?

Figure 2: Outdoor games and toys market segmentation in Europe



Source: Globally Cool, GO! Good Opportunity & Remco Kemper

## Low-end market

The low-end segment focuses on accessible prices, functionality and basic designs. Typical retailers are hypermarkets like [Auchan](#) and garden centres like [Intratuin](#). Because this segment is dominated by low-cost and mass-produced items, opportunities are limited for smaller manufacturers like you. Focus instead on the mid- to high-end market.

## Mid-end market

The mid-end segment follows trends, at reasonable prices. Craftsmanship, natural materials and/or sustainable values play a role, especially in the higher mid-end segment. Outdoor games and toys in this segment also make nice gifts. Important players are toy specialists like [Cogs Toys & Games Ireland](#) and [Smoby](#).

## High-end/premium market

At the higher end of the market, outdoor games and toys are characterised by high-quality design, craftsmanship and brand names. Some leading brands are [GRIMM'S](#) and [DJECO](#). These products are typically sold in small, specialised boutique toy shops, as well as luxury department stores like [Galeries Lafayette](#). The volumes might be limited though.

## Through which channels do outdoor games and toys land on the end market?

Market access channels for outdoor games and toys mainly follow traditional patterns. Importers/wholesalers supply to retailers. Larger retail chains often bypass them and import for themselves, while increasing numbers of smaller retailers have also started buying directly from suppliers. In some cases, buying agents play a role.

Figure 3: Trade channels for outdoor games and toys in Europe



Source: Globally Cool, GO! Good Opportunity & Remco Kemper

## Importers/wholesalers

Importers/wholesalers sell products to retailers in their own country or region, or re-export across Europe. Supplying to buyers in the project market is another distribution flow for them.

These importers/wholesalers handle the import procedures. They take ownership of the goods when they buy from you (unlike agents), taking on the risk of the onward sale of the products. Developing a long-term relationship can lead to a high level of cooperation on appropriate designs for the market, new trends, use of materials, types of finishing, and quality requirements.

## Importing retailers

Retailers come in many sizes: large and part of a chain, or small and independent. Especially larger retail chains habitually import directly from their suppliers in developing countries. Many even have their own buying offices in developing countries. Others – mainly smaller independent stores – order in Europe from wholesalers.

There is a tendency towards consolidation in European retail. Large retail brands are becoming more widespread and more lifestyle-centred, offering home decoration and textiles as well as fashion accessories.

## Buying agents, buying houses and sales agents

You can encounter several types of intermediaries when doing business with European buyers:

- European buying agents represent European buyers in sourcing countries, and do not import products themselves. Sometimes they have a more limited role, such as checking the quality of the products. They can work individually or as part of a purchasing company.
- Buying houses are comparable to buying agents, but they are based in your country and usually offer more services. These can range from raw material sourcing to design and sampling services.
- European sales agents can help you find European buyers. But be careful before entering into agreements with commercial agents, because [European legislation protects their position](#).

Agents and buying houses mostly work on commission. They may approach you, or your buyer may request an intermediary. Still, always try to work with your buyer directly. This saves on commission and allows you to communicate directly with your buyer.

## E-commerce

E-commerce has grown in recent years. Your easiest way to benefit is by supplying to a European wholesaler or retailer with a strong online presence. This is usually not a separate channel. Retailers often combine online and offline channels, and the way of supplying to them is the same. Companies that only sell online also need to take stock before they can sell.

### Direct business-to-consumer (B2C) sales

Selling directly to European consumers via your own website can be complicated and costly. You are responsible for factors like aftersales obligations and payment systems for consumer use. For most exporters from developing countries this is not feasible. In addition, according to the Dutch consumer association Consumentenbond, [Dutch consumers bought less from non-EU web shops](#) after [new EU VAT rules](#) were rolled out in 2021. This makes direct online sales even less attractive.

#### Tips:

To find buyers, search exhibitor lists or attend the main trade fairs in Europe: [Spielwarenmesse](#), [spoga + gafa](#), [Ambiente](#) and [Maison&Objet](#).

Check our [tips for finding buyers](#).

For more information about trading directly with smaller retailers and e-commerce, read our study about [alternative distribution channels](#).

## What is the most interesting channel for you?

Importers/wholesalers are the main channel between exporters in developing countries and European retailers. They are interesting if you want to develop a long-term relationship. These importers usually know the European market well, so they can provide you with valuable information and guidance on market preferences. They generally prefer FOB or FCA Incoterms.

Figure 4: Incoterms



Source: Globally Cool, GO! Good Opportunity & Remco Kemper

Large retailers are increasingly importing for themselves to cut out the margins of importers/wholesalers, reduce time to market, and have more control over product design and finish. This could offer you opportunities. Smaller, independent retailers need to differentiate from retail chains on value-added service, specialised offers and authenticity. Buying directly from producers in developing countries is an interesting way for them to do so. They typically prefer small order quantities per item, small total order volumes, and doorstep delivery via Delivered Duty Paid (DDP) or Delivery At Place (DAP). Repeat orders are less likely.

The trend of direct sourcing is expected to continue. This may create more opportunities for you, as a growing pool of buyers could improve your bargaining position. Because importing retailers order for their own shops, they can place orders much quicker than importers/wholesalers who may need to show samples to their retailers before ordering. You need to calculate if trading directly with (smaller) retailers is cost-effective for you.

#### Tips:

Consider targeting retailers directly to improve your bargaining position and potentially close deals faster.

Relate your offer and terms to the targeted retailer (large/small). If you are unsure, ask your existing buyers how they operate. The better informed you are, the better you will be able to set prices.

Build a relationship based on mutual benefits by offering services like fast delivery and after-sales support.

If you are interested in selling to small independent retailers, make sure to have a policy for them when you attend international trade fairs. You must have appropriate terms of trading, like low minimum order quantities or pre-stocking.

### 3. What competition do you face on the European outdoor games and toys market?

Europe's leading supplier of games and toys is China. A lot of these supplies consist of mass-produced items for the lower-end segments. Instead of competing with mass-producing companies, your best opportunities are in the mid- to high-end segments, where you compete with suppliers from countries like Vietnam and Indonesia.

Because no specific trade data are available for outdoor games and toys, these statistics cover HS codes for decorative objects in general.

China is by far Europe's main supplier of the selected product groups, with 43% of imports in 2023; it is followed by Czechia (9.3%), Germany (7.0%), Hungary (5.5%), the Netherlands (4.1%) and Vietnam (2.9%).

#### Re-exporters or producers

European countries have different roles in the HDHT market. Some are mainly importers and others are mainly manufacturers. Western European countries are mainly importers. Most Western European importers are re-exporters. They do not just sell their products in their own country, they distribute them across the continent.

European production takes place mainly in Eastern Europe, owing mostly to relatively low transport and labour costs. This can make these countries a good alternative for European buyers to source low- to mid-end products. Western and Southern Europe also produce some high-end products from well-known, long-established premium brands.

## Which countries are you competing with?

Source: UN Comtrade

### China: dominates the low-end market

China is by far Europe's leading supplier of games and toys. However, its supplies dropped from a peak of €10 billion in 2022 to €7.8 billion in 2023. This translated to an average annual rate (CAGR) of 0.4% from 2019 to 2023, and a direct import market share that fell from 45% to 43%. China mainly supplies the lower-end market, often with mass-produced plastic items and electronic toys and games.

China benefits from its large-scale and highly mechanised production systems, low-cost workforce, availability of raw materials, and efficient shipping to Europe compared to other Asian countries. However, its rising labour costs in the last 10 years have affected its price competitiveness. In the coming years, China's trade war with the United States and other disruptions may affect exports.

Although cheap Chinese e-commerce platforms like Temu and Alibaba have become increasingly popular, they are subject to product quality issues and ethical concerns. In November 2024, [the European Commission urged Temu to respect EU consumer protection laws](#) following various infringing practices on the platform. The Commission has opened [formal proceedings against Temu](#) to assess whether it has breached the [Digital Services Act](#) in areas linked to, for example, the sale of illegal products.

To avoid competition from Chinese suppliers on costs, make your product offering stand out and stay away from mass-produced objects. Focus more on handmade products, sustainability, and the story behind your product. Smaller European importers are increasingly looking for suppliers in other Asian countries like Vietnam, Indonesia, India and Thailand. They want to diversify their collection and become less dependent on China as a single supplier. This also goes for importers whose designs require handwork.

### Czechia: regional supplier

Czechia's exports of games and toys to Europe peaked at €2.1 billion in 2021 before returning to €1.7 billion in 2023, which is comparable to 2019. As an Eastern European country, Czechia benefits from being close to the Western European market. Hungary and Poland also play a role in this category. Their location allows suppliers to offer short delivery times. Plus, labour is relatively affordable compared to Western Europe.

Eastern European suppliers generally have a good understanding of the European consumer and have well-established and efficient production lines. This makes them attractive partners in the second-sourcing trend away from China. They mainly compete in the more price-sensitive lower and lower-middle ends of the market. So focus instead on higher-end segments through sustainable materials, special design value, craftsmanship and the story behind your product. Make sure you offer a high level of service to build strong, lasting relationships.

### Vietnam: another low-cost producer

Like suppliers from China, Vietnamese manufacturers are very productive and can deliver at low costs. Vietnam's exports of games and toys to Europe practically doubled from €266 million in 2019 to €521 million in 2023. This translated to a CAGR of 18% plus a direct import market share that grew from 1.6% to 2.9%.

Vietnamese suppliers generally have a good idea of what is commercial and trendy in Europe. This is because Vietnam's HDHT sector has been working with the European market for decades. They effectively combine handmade and mechanised production and can cater to a wide range of lower- and mid-end markets. As such, they have become an effective second-sourcing alternative to suppliers from China.

## **Indonesia: increased market share**

Indonesia's exports of games and toys to Europe also nearly doubled, from €152 million in 2019 to €297 million in 2023. With a CAGR of 18%, the country's direct import market share grew from 0.9% to 1.6%. This made Indonesia Europe's 13<sup>th</sup>-largest supplier.

Indonesia is known for its wooden products, often made from reclaimed wood. Wages in Indonesia are relatively high for the region. This means suppliers have to target the mid- to high-end markets to be able to compete. They often offer a range of (handmade) products in a particular material. This allows lifestyle buyers to do some convenient one-stop shopping in Indonesia and fill containers with a complete offer. The logistical structure and business climate in Indonesia are good, making the country accessible to European importers.

## **Which companies are you competing with?**

The following companies are examples of the type of competition you face in the European market for outdoor games and toys.

### **PlanToys, Thailand**

[PlanToys](#) manufactures toys that inspire imaginative play while promoting environmental consciousness. Focusing on sustainability and child development, their goal is that children 'not only grow in their ability to imagine and create with our wooden toys, but that they also grow closer to nature, better understand the importance of a green lifestyle and successfully develop along the way'. The company is SA8000-certified and provides benefits and activities to promote the health and wellbeing of their employees, including free rice for lunch, relaxation spaces and a savings cooperative.

PlanToys has implemented a circular economy approach, using sustainable materials. For their wooden toys, they use reclaimed rubberwood that no longer produces latex. With the byproducts they make plywood and 'PlanWood' (from upcycled sawdust). The leftover wood pieces are used as fuel for the manufacturing process. PlanToys calculates the carbon emissions for each product using the Thailand Greenhouse Gas Management Organization's method, and prints this information on the packaging.

Figure 6: PlanToys sustainability

Source: [PlanToys @ YouTube](#)

## **Selyn, Sri Lanka**

WFTO Guaranteed [Selyn](#) is a social enterprise that strives to empower women artisans and their families and communities through the revival of traditional handloom craftsmanship. Their handmade educational toys come in vibrant colours and are easily washable; they are made with locally sourced GOTS-certified organic cotton and eco-friendly, non-toxic dyes. Selyn's goal is to 'empower children through safe, eco-friendly toys, fostering creativity and environmental consciousness to inspire a generation dedicated to a brighter, more sustainable future'.

Figure 7: the Selyn story



Source: [Selyn @ YouTube](#)

## **Bebeji Design, Türkiye**

[Bebeji Design](#) is an example of how a manufacturer can extend its offer and markets. The company has developed a presence in indoor and outdoor games and toys, for both private and more public spaces. They have also moved into children's furniture and fencing, covering both the consumer goods market and the project market with brands for each major direction. This ability is due to their broad range of materials (wood, MDF, foams, metals – all of national origin) and manufacturing skills set, as well as their experience in health and safety compliance.

## **Which products are you competing with?**

Competition for outdoor games and toys mostly comes from within the product category itself. Consumers can choose between various materials and designs, price levels, and brands.

### **Tips:**

Compare your products and company to the competition. You can use [ITC Trade Map](#) to find exporters by country.

To stand out, particularly in the higher-mid and premium markets, focus on special techniques and designs, craftsmanship, functionality, the story behind your product, and your sustainable values.

## **4. What are the prices of outdoor games and toys on the European market?**

Prices for outdoor games and toys vary across market segments. After adding logistics costs, wholesaler and

retail margins, and value added tax (VAT), European consumer prices are about 4-6.5 times your selling price.

Table 1 gives some examples of prices across market segments. Be aware that these are just an indication, since prices vary depending on technique, size, material, design, brand and other ways of value addition, including a strong sustainable concept.

Table 1: Indicative consumer prices of selected outdoor games and toys in Europe

	Low-end	Mid-end	High-end
Skittles	Up to €20	€20-75	€75 or more
Ring toss	Up to €20	€20-75	n/a
Kubb	Up to €20	€20-55	€55 or more

Consumer prices depend on the value perception of your product in a particular segment. This is influenced by your marketing mix.

Figure 8: Marketing mix – the four P's



Source: Globally Cool, GO! Good Opportunity & Remco Kemper

In addition to energy, labour and transport costs, **FOB** prices depend heavily on the availability and cost of raw materials. Occasional cost increases are not directly passed on to the consumer, so they put pressure on margins in the supply chain. However, recent disruptions have resulted in longer-term cost increases. This continuing pressure has made many retailers raise their consumer prices. If/when costs drop again, consumer prices may follow.

Consumer prices generally consist of:

- Your FOB price
- Shipping, import, handling costs
- Wholesaler margins
- Retail margins
- VAT – varies per country, about 20% on average

Figure 9: Price breakdown indication for outdoor games and toys in the supply chain



Source: Globally Cool, GO! Good Opportunity & Remco Kemper

To illustrate: in Table 2 the FOB price is set at €10. Depending on the segment your product is designed for, the consumer price ranges from €41 (low-end) to €65.50 (high-end).

Table 2: Example of price breakdown per market segment

	Low margin	Middle margin	High margin	
FOB price	€10.00	€10.00	€10.00	Your FOB price
Transport, handling charges, transport insurance, banking services (20/15/15%)	+2.00 €12.00	+1.50 €11.50	+1.50 €11.50	Landed price for wholesale importer
Wholesalers' margins (50/75/90%)	+6.00 €18.00	+8.60 €20.10	+10.40 €21.90	Selling price from wholesale importer to retailer
Retailers' margins (90/110/150%)	+16.20 €34.20	+22.20 €42.30	+32.70 €54.60	Selling price excl. VAT from retailer to end consumer
Selling price incl. VAT (20%)	+6.80 €41.00	+8.50 €50.80	+10.90 €65.50	Selling price incl. VAT from retailer to end consumer

The FOB price of €10 includes your own margins. These depend on your efficiency and price setting. Margins in the lower segment are generally smaller than in the middle and higher segments.

Examples of consumer prices are:

- Ring toss game with FSC-certified beech wood and pinewood, [Søstrene Grene](#), €18.08
- Beach toy mill with 53% RCS-certified recycled polyethylene, [Zara Home](#), €22.99
- Beech wooden skittles game in jute bag, [Manufactum](#), €69.90

#### Tips:

Study consumer prices in your target segment to determine your price and adjust your cost accordingly. Your quality and price must match your target segment.

Calculate your prices regularly and carefully, especially if the prices of your raw materials fluctuate. When raw material prices put pressure on your margin for a longer period, consider increasing your price or finding an alternative.

Understand your segment. Offer a correct marketing mix to meet consumer expectations. Adapt your business model to your position in the market.

CBI.

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