

Tabletop Games Market - Global Outlook & Forecast 2025-2030

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Report description:

The global tabletop games market is expected to grow at a CAGR of 9.76% from 2024 to 2030.

MARKET TRENDS & DRIVERS

Shift Toward Sustainable & Eco-Friendly Practices

Consumers are increasingly choosing eco-friendly products, including tabletop games, as concerns over environmental issues such as climate change, deforestation, and plastic pollution. This shift is prompting companies to rethink how they design, produce, and market their games, focusing on sustainability. Many manufacturers in the tabletop games market are now turning to sustainable materials, such as biodegradable plastics, recycled paper, and certified wood, to reduce their environmental impact. Companies such as HABA Familygroup are using certified sustainable wood and non-toxic paints, while CMON is opting for biodegradable plastics for their game pieces. Stonemaier Games is cutting down on plastic by using recycled paper for game boards and packaging. Blue Orange Games is replacing plastic packaging with recycled cardboard, and Days of Wonder is ensuring responsible sourcing with FSC-certified paper. These changes are helping to minimize waste and promote a circular economy in the tabletop game industry.

Growing Number of Tabletop Game Cafes

Tabletop game cafes are becoming a key part of the growing tabletop games market. These cafes offer a social space where people can enjoy games, food, and drinks while connecting with others who share the same interests. They host events such as game nights and tournaments to help build a community of tabletop game enthusiasts and create a friendly environment for newcomers. These cafes allow customers to try out a variety of games, including new releases and lesser-known titles, making it easier for people to discover new games without having to buy them. This lowers the barrier to entry for new players and encourages more frequent gaming. The rise of tabletop game cafes is contributing to industry growth by attracting more customers, increasing game sales, and expanding the community. Family-friendly cafes, such as Gamehaus Cafe in Los Angeles

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and AU BONHEUR DES JEUX in Paris, make it easier for people of all ages to enjoy gaming together. With more cafes opening in 2024, this trend is helping to grow the tabletop game market further.

SEGMENTATION INSIGHTS

INSIGHTS BY GAME TYPE

The global tabletop games market is an ever-evolving industry that has continued to grow in popularity due to the increasing interest in social and recreational activities. The board games hold the most significant share of the global market in 2024. The board games segment dominance can be attributed to their long history, widespread appeal, and versatility. Board games are accessible to a broad audience because they have simple rules that are easy to learn, and they can be played in diverse settings, from family gatherings to social game nights. Additionally, board games cover a wide range of themes and genres, including strategy, party, and cooperative games, catering to different interests and preferences. Their convenience-requiring little setup and providing engaging, structured gameplay-further contributes to their popularity, making them the top choice for many gamers. In comparison, other categories such as dexterity, tile-based, and paper & pencil games often appeal to more specific player preferences or require specialized skills, which limits their overall market reach. This versatility and widespread appeal make board games the leading segment in the tabletop games market.

INSIGHTS BY BOARD GAMES

The board games category of the global tabletop games market can be sub-categorized as tabletop board games, collectible card games, card & dice games, miniature games, and RPG board games. Among these segments, tabletop board games are the dominant category. This dominance can be attributed to their broad appeal and accessibility to a wide range of players. Tabletop board games are easy to understand, require minimal setup, and can be played in various environments, making them highly convenient. Their structured gameplay, combined with a wide variety of themes and genres, such as strategy, cooperative, and party games, makes them suitable for both casual players and serious enthusiasts. In contrast, other segments such as collectible card games, miniature games, and RPG board games often cater to more niche audiences or require a higher level of skill and commitment, limiting their overall reach. This versatility and accessibility make tabletop board games a leading segment in the tabletop games market.

INSIGHTS BY RPG BOARD GAMES

The RPG board games categories of the global tabletop games market can be categorized as traditional, narrative-driven, hybrid, digital, and other RPG board games. Among these segments, traditional RPG board games are the dominant ones. This is primarily due to their long-established presence and strong cultural roots within the tabletop gaming community. Traditional RPGs, such as Dungeons & Dragons, are popular for their immersive storytelling, deep character development, and social interaction. These games have built a dedicated fan base over the years and continue to attract new players due to their rich gameplay and versatility. While newer categories such as digital RPGs and hybrid RPGs are growing, traditional RPG board games maintain dominance because of their established format, extensive content libraries, and strong support networks, including gaming groups, conventions, and online communities. This established presence makes them the dominant segment in the RPG board game category.

INSIGHTS BY THEME

The educational tabletop games theme segment holds the most prominent share of the global tabletop games market. This dominance is driven by their broad appeal across various age groups, particularly in schools, educational institutions, and family settings. Educational games provide a fun and interactive way to learn, making them highly popular among parents and

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educators. They are designed to improve cognitive skills, problem-solving abilities, and critical thinking in a way that is engaging and entertaining. Furthermore, with the growing emphasis on hands-on learning and experiential education, these games are increasingly used as effective teaching tools. Countries investing heavily in education reform and interactive teaching methods drive the demand. For instance, North America, Western Europe, and parts of Asia (e.g., Japan, South Korea, and India) are integrating these games into classrooms and homes. Unlike other segments such as strategy & war or fantasy tabletop games, which often cater to more specific interests, educational tabletop games have a universal appeal, making them the leader in the global tabletop games market.

INSIGHTS BY USER GROUP

By the user group, the global tabletop games market can be categorized as adults, kids, and family & party. Adults are the dominant group in this segment, largely due to the growing popularity of tabletop games among adult players, particularly with the rise of strategy games, RPGs, and CCGs, which require higher levels of engagement and cognitive skills. Adults are often more willing to invest time and money into purchasing complex games, attending events, or participating in gaming communities. Additionally, tabletop games for adults offer a social and relaxing way to spend time with friends, providing an alternative to digital entertainment. The increasing trend of game cafes, where adults gather to play, and the rise of hobbyist and competitive gaming has further boosted the dominance of adults in the tabletop games market.

INSIGHTS BY DISTRIBUTION CHANNEL

The offline distribution dominates the global tabletop games market. This is primarily due to the strong presence of physical game stores, specialized hobby shops, and events such as board game conventions, where consumers can directly experience and purchase tabletop games. Offline channels allow customers to interact with the games, get recommendations from knowledgeable staff, and enjoy a hands-on experience that is difficult to replicate online. Additionally, social spaces such as game cafes and community gatherings foster in-person play and encourage people to explore new titles. Despite the growing popularity of online sales, offline distribution still holds a significant share of the tabletop games market because of its ability to provide an immersive and personalized shopping experience for tabletop game enthusiasts.

INSIGHTS BY OFFLINE DISTRIBUTION CHANNEL

The offline distribution channel segment of the global tabletop games market can be further categorized as specialty stores, mass market players, and other offline channels. Specialty Stores are dominant in the category and this dominance is largely due to the expertise and focused selection of products these stores offer. Specialty stores are known for curating a wide range of tabletop games, often including niche and indie titles that may not be available in mass-market outlets. Customers visit specialty stores for personalized experiences, where the staff is knowledgeable about the games, can provide recommendations, and create a community atmosphere for enthusiasts. These stores often host in-store events, game nights, and tournaments, further increasing their appeal. Hence, specialty stores remain the dominant offline channel for tabletop games, catering to the growing demand for both mainstream and unique gaming experiences.

GEOGRAPHICAL ANALYSIS

The global tabletop games market continues to expand globally, driven by the increasing consumer interest in immersive, strategic, and social gameplay experiences. In 2024, North America continued to lead the global tabletop games market, driven by its established gaming culture, high disposable income, and strong retail network. The region holds a significant tabletop games market share, thanks to its ability to innovate and adapt to changing consumer preferences. This dominance is supported by key drivers such as a growing interest in family-friendly games, strategy-based gameplay, and hybrid formats that combine physical and digital elements. Popular conventions such as Gen Con, which attract thousands of gamers annually, also play a

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crucial role in promoting game discovery and driving sales.

APAC is emerging as a fast-growing tabletop games market, fueled by the increasing demand in countries such as China, Japan, South Korea, India, and Australia. This expansion is driven by a combination of cultural innovation, technological integration, and evolving consumer preferences. With a younger demographic eagerness to explore new gaming formats and the growing popularity of game cafes and e-commerce platforms, the region is transforming into a dynamic hub for tabletop gaming. Furthermore, Europe continues to play a central role in the global tabletop games market, with the UK, Germany, and France leading the charge. Known for its innovative and well-crafted Eurogames (strategy-focused board games), the region remains a preferred market for players who value thoughtful gameplay, high-quality design, and deep strategic elements. Europe's success is driven by a strong focus on strategic gameplay, localized editions, and a robust culture of community-driven events such as game fairs and conventions.

The tabletop games market in Latin America is growing steadily, with Brazil, Argentina, and Mexico leading the charge in 2024. This growth is a result of better accessibility through e-commerce, adaptations of games that resonate with local culture, and a focus on family and educational use. While the market is smaller compared to North America or Europe, its untapped potential and young, dynamic audience make it a promising area for growth. Furthermore, the tabletop games market in the Middle East & Africa is steadily gaining momentum, supported by urbanization, a revival of interest in traditional games, and the growing presence of international brands. One of the standout trends in the Middle East & Africa is the modern adaptation of traditional games. For example, ancient games such as Senet, a classic from Egyptian culture, are being reintroduced with modern visuals and updated mechanics. These new versions not only resonate with local players who value their cultural heritage but also attract international audiences curious about the region's history.

SEGMENTATION & FORECAST

Segmentation by Product

- Board Games

- Dexterity Games

- Tile-Based Games

- Paper & Pencil Games

Segmentation by Board Games

- Tabletop Board Games

- Collectible Card Games

- Card & Dice Games

- Miniature Games

- RPG Board Games

Segmentation by RPG Board Games

- Traditional

- Narrative-Driven

- Hybrid

- Digital

- Other RPG Board Games

Segmentation by Theme

- Educational Tabletop Games

- Strategy & War Tabletop Games

- Fantasy Tabletop Games

- Sports Tabletop Games

- Historical Tabletop Games

- Other Tabletop Games

Segmentation by User Group

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- ?□Adults
- ?□Kids
- ?□Family & Party
- Segmentation by Distribution Channel
- ?□Offline
- ?□Online
- Segmentation by Offline Distribution Channel
- ?□Specialty Stores
- ?□Mass Market Players
- ?□Other Offline Channels
- Segmentation by Geography
- ?□North America
- ?□The U.S.
- ?□Canada
- ?□APAC
- ?□China
- ?□India
- ?□Japan
- ?□Indonesia
- ?□South Korea
- ?□Australia
- ?□Malaysia
- ?□Europe
- ?□The U.K.
- ?□France
- ?□Germany
- ?□Russia
- ?□Italy
- ?□Sweden
- ?□Norway
- ?□Latin America
- ?□Brazil
- ?□Mexico
- ?□Argentina
- ?□Columbia
- ?□Middle East & Africa
- ?□South Africa
- ?□Turkey
- ?□Saudi Arabia
- ?□UAE

COMPETITIVE LANDSCAPE

The global tabletop games market is experiencing intense competition, driven by an influx of independent vendors and evolving consumer preferences. While traditional giants such as Hasbro and Mattel continue to dominate a significant portion of the global tabletop games market, the industry has become increasingly fragmented due to the emergence of smaller vendors. These independent players are leveraging creative designs, low production costs, and family-oriented game concepts to carve out their

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Recent Developments in the Global Tabletop Games Market

□ Asmodee's Strategic Move (2021): Acquiring Plan B Games bolstered its portfolio with hit titles like Azul, expanding its dominance in North America.

□ Embracer Group's Power Play (2022): By acquiring Asmodee, Embracer solidified its foothold in the global tabletop market, securing one of the industry's biggest publishers.

□ Flat River Group's Expansion (2021): The acquisition of Greater Than Games enhanced Flat River's distribution network while adding acclaimed titles like Spirit Island to its catalog.

Key Company Profiles

□ Embracer Group (Asmodee Group)

□ Hasbro

□ Mattel

□ Ravensburger

□ Goliath Games

Other Prominent Vendors

□ Asmadi Games

□ Bezier Games

□ BoardGameDesign.com

□ Buffalo Games

□ Clementoni

□ CMON

□ Disney

□ Funko

□ Games Workshop

□ Gibsons Games

□ Grey Fox Games

□ IELLO Games

□ Indie Boards and Cards

□ INI

□ Epoch Everlasting Play

□ Imago Group

□ Kamings Trade Co

□ Learning Resources

□ Lifestyle Boardgames

□ Looney Labs

□ Ludo Fact

□ Melissa & Doug

□ MindWare

□ North Star Games

□ Orchard Toys

□ Panda Game Manufacturing

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? Pegasus Spiele
? Piatnik
? Reaper Miniatures
? Rio Grande Games
? Schmidt Spiele
? Spin Master
? Spontaneous Games
? Surprised Stare Games
? SunsOut
? Talicor
? TREND enterprises, Inc.
? Ultra PRO International
? University Games
? USAopoly
? Winning Moves Games
? WizKids
? Zobmondo
? Stronghold Games
? Yellow Games
? Blue Orange Games
? Fireside Games
? SmartPlay Games
? Elzra Games
? Ludonaute

KEY QUESTIONS ANSWERED:

1. How big is the global tabletop games market?
2. What is the growth rate of the global tabletop games market?
3. What are the significant trends in the tabletop games market?
4. Which region dominates the global tabletop games market share?
5. Who are the key players in the global tabletop games market?

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