

Brazil Gaming Market Forecast 2025-2032

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Report description:

KEY FINDINGS

The Indonesia gaming market was valued at \$4.83 billion in 2024 and is expected to rise with a CAGR of 5.89% over the forecast years of 2025 to 2032. The base year regarded for the studied market is 2024, and the forecasting years are from 2025 to 2032.

MARKET INSIGHTS

Indonesia's gaming market has experienced impressive growth, making it one of the largest markets in Southeast Asia. By 2023, over 150 million Indonesians were active gamers.

This growth is driven by widespread internet connectivity, with 79.50% of Indonesians online, surpassing the global average of 67.10%. As a result, local game developers have gained the ability to reach both domestic and international markets.

However, the industry faces significant challenges. In 2022, local developers captured only 0.50% of the total gaming revenue, while foreign entities dominated the market. This disparity leads to substantial capital outflow, as most of the revenue generated by Indonesian gamers benefits overseas companies.

In response, the Indonesian government enacted Presidential Regulation No. 19 of 2024 to accelerate the development of the national gaming sector. This regulation requires foreign game developers to establish a local presence or partner with Indonesian developers to distribute their games within the country.

The government also plans to introduce training programs in collaboration with educational institutions to address the current skills shortage among local developers. To stimulate growth, it is considering financial incentives, such as tax holidays and funding through public service agencies.

Emerging gaming industry trends offer further opportunities. The Indonesia Game Developer Exchange (IGDX) Conference has emerged as a key platform, driving collaboration between local and international industry players.

These events not only boost the competitiveness of Indonesian developers but also help position the country as a hub for gaming innovation in the region. However, regulatory challenges remain.

The government is contemplating a social media ban for children under 16, inspired by Australia's legislation, to curb concerns about minors' exposure to online gambling. While the intent is to protect young users, such measures could impact gaming companies' strategies to acquire younger users.

SEGMENTATION ANALYSIS

The Indonesia gaming market segmentation includes the market by type, component, platform, genre, monetization model, age demographic, and distribution channel. The platform segment is further segregated into console gaming, mobile gaming, PC

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gaming, and cloud gaming.

Indonesia's mobile gaming market has seen vital expansion, fueled by widespread smartphone adoption and a youthful, tech-savvy population. In 2022, the country recorded approximately 3.37 billion mobile game downloads, ranking third globally, behind India and Brazil.

The rise of affordable smartphones and improved internet infrastructure have driven this growth. Notably, Indonesia's smartphone penetration has exceeded 128% of the total population, indicating that a significant number of individuals own more than one device.

Local game developers have also made valuable contributions. For example, 'Lokapala,' Southeast Asia's first Multiplayer Online Battle Arena (MOBA) game, incorporates elements of Indonesian culture, such as the Borobudur and Prambanan reliefs, offering players a distinctive gaming experience.

COMPETITIVE INSIGHTS

Some of the top players operating in the Indonesia gaming market include Agate, Arsnesia (Pt Arsa Grup Indonesia), Digital Happiness (Pt Digital Semantika Indonesia), etc.

Founded in 2009 and headquartered in Bandung, Indonesia, Agate is a prominent game development company in Southeast Asia. The company operates in two primary business segments: Consumer Games and Enterprise Solutions.

In the Consumer Games segment, Agate has created over 250 titles across various genres, including notable games such as 'Valthirian Arc: Hero School Story' and 'Code Atma.'

The Enterprise Solutions segment specializes in gamification services, providing custom applications for corporate clients to improve learning, assessment, and advertising. Agate serves a wide range of clients across Southeast Asia and the United States, collaborating with more than 50 well-known companies.

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