



**PRESS RELEASE**

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## **Games + jigsaws: slight decline during crisis**

**Essen, 5 Oct 2022**

**After the boom of the last two years, the toy sector cannot quite escape the current crisis. In the first eight months of 2022, sales of games and jigsaw puzzles in Germany declined by about 7 %. Nonetheless, compared to 2019 the market still shows double-digit growth. The sector is again expecting a high level of interest in games for the Christmas trade.**

**(Source: NPD Eurotoys)**

Games have been in vogue for several years and had experienced sharp growth once again during the Covid-19 crisis. Many families made frequent use of games and jigsaw puzzles in the lockdown period as shared interests and pursuits. Now, however, the combination of the Ukraine crisis, exploding energy costs and galloping inflation have hit consumer sentiment and consumption patterns hard. Cumulative sales for 2022 have therefore been weaker than in the boom year of 2021 so far.

The overall interest in games remains high. Games are becoming more and more popular as a way of switching off from the overloaded digital world while simultaneously having the opportunity to spend some quality time with friends or family. They also have enormous value as meaningful, creative and sometimes challenging leisure pursuits. This was important during lockdown and will certainly continue to be in the difficult months that lie ahead.

The theme of the games and the scenarios in which the players move require concentration on the one hand, while on the other hand it allows them to become immersed for a while in other worlds.

In uncertain times, games are a source of relaxation and balance, while at the same time bringing different generations of friends and family together. In the digital age, personal communication and the shared experience are sought and valued by more and more people. The growing number of collaborative games promotes this sense of shared experience and confirms the trust and joy it brings.



**SPIELEVERLAGE E.V.**

In the toy market as a whole, the dynamics are similar to those in games and jigsaws, showing a change of -7 % so far. While sales of soft toys grew markedly in 2022, outdoor toys and dolls declined. The start of the Ukraine crisis and the spring in particular were periods of weak sales, but things improved again over the summer. Children's games and card games tended to head the field. One-person games like logic games are also in high demand. On the other side, adult games are currently less in demand during the crisis. As more expected, fewer jigsaw puzzles were sold, after having seen the biggest growth during the Covid-19 period.

Following the problematic pandemic phase, the publishers have expanded their ranges and developed a number of innovations. Some novelties whose launch was delayed will now be appearing in the upcoming weeks.

Hermann Hutter of publisher Huch! Verlag, 1<sup>st</sup> Chairperson of 'Spieleverlage e.V.', the organisation for the sector managed by the German Toy Industry Association, is looking confidently to the future: 'The many exciting innovations are grounds for optimism. We are expecting strong demand for games and jigsaws in the imminent winter and Christmas season. High quality and the shared fun of game evenings make games one of the most appealing gifts, both for Christmas and for other occasions.'

In the last two years, supply chain problems have created a number of challenges for the publishers. The situation has shown signs of improvement in this regard; delivery times and availability have improved markedly. Lack of capacity at German container ports, however, is still a problem. Inflation is a tangible issue for the publishers, bringing large increases in paper prices and transport costs, currency losses and the huge leap in energy prices for production. So far, these cost increases have been passed to the customer only to a limited extent. The prices of games continue to be lower in Germany than in neighbouring countries of Europe.

Following the closures of the last two years, the physical retail sector is regaining market share and has expanded its range of games and jigsaw puzzles. Many smaller retailers, meanwhile, have become increasingly active in online sales. This is allowing them to offer a broader range to their customers. What remains a problem for retail business is the low footfall in city centres and the high energy costs, a burden for which the sector needs urgent help from the state.



**SPIELEVERLAGE E.V.**

The game publishers are looking forward to the world's biggest board game fair in Essen, SPIEL '22, at which again over 1.800 novelties and world premieres will be presented to the public. The fair gives them the ideal opportunity to test the new products and establish contact with the publishers and game authors. 'After the pandemic, players are looking for more contact with individuals again and for the opportunity to try out new games together', says Hermann Hutter. 'There is no better place to experience the innovative strength of the sector than at the SPIEL fair and at games festivals'

**Spieleverlage e.V. is an association of the most significant game publishers in the German-speaking region, and it:**

- shares sales figures and trends in the games sector
- promotes games as a whole to schools
- initiates and promotes the involvement of new target groups in matters relating to games
- promotes the network of large and small public gaming events in the best possible way
- supports games events and fairs for the public, with free loans of sample games
- devotes itself to gaining recognition for games as a societal and educational cultural benefit
- underlines in work with the media the importance to children of learning through games
- acts for its members as a forum for the discussion of business policy problems and issues of general interest.

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Spieleverlage e.V. represents the following publishers:  
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