spielwarenmesse®



JOIN THE BIGGEST TOY COMMUNITY WORLDWIDE

NÜRNBERG, 2 – 6 FEB 2027

Spielwarenmesse Dialogue South Africa 2026

Unlocking South Africa's R8.7 Billion Toys & Games Potential Through Collaborative Anti-Counterfeiting Action

Prepared by: S.A. Toys and Games Association (SATAGA) | Target Audience: Global Brand Owners, Industry Leaders, Retailers, Distributors & Trade Delegates

1. Executive Briefing: The Strategic Crossroads of South Africa's Toys & Games Industry

The South African toys & games industry stands at a decisive tipping point:

- ❑ On one side lies an expansive consumer market valued at approximately R8.7 billion, with strong brand aspiration and growing demand across physical retail and online platforms.
- ❑ On the other side sits a rapidly escalating shadow economy that is currently estimated to be worth approximately R1.9 billion annually due to counterfeiting.

The massive monetary disruption caused by counterfeit trade should not be viewed as a cause for retreat, but as:

- ❑ compelling evidence of the immense market expansion potential awaiting legitimate businesses, brand owners, and investors once effective, continuous, and collaborative enforcement is established.

STRATEGIC TAKEAWAY SPIELWARENMESSE DIALOGUE 2026

- South African Toys & Games Market - approx R8.7 Billion;
- Illicit Market Capture: R1.9 Billion (23.0% to 25.0% value penetration).
- Strategic Imperative: Effectively combatting counterfeits could redirect R1.9 billion back into the legitimate formal sector while restoring R300 million+ to the national fiscus.

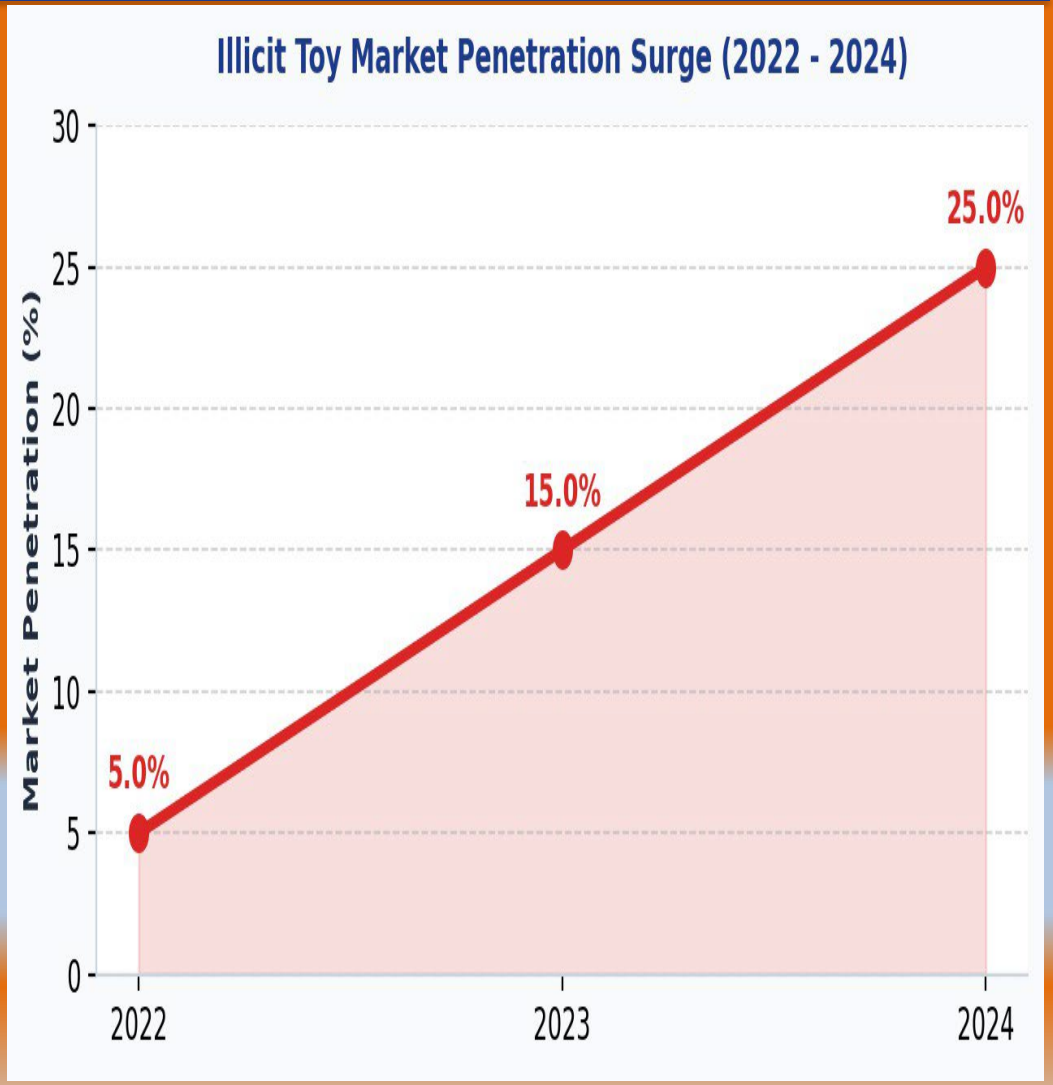
2. Sector Focus: The Toys & Games Industry Under Siege

Within the broader macroeconomic challenge, the South African toys & games industry has experienced an unprecedented surge in counterfeiting, moving from a peripheral issue to an acute economic crisis.

- **2022: 5.0% Market Penetration**
- **2023: 15.0% Market Penetration**
- **2024: 25.0% Market Penetration**

- **2026: estimated 23%**

Today, nearly one in every four rands spent on toys in South Africa flows into illicit channels, rewarding illicit operators who evade custom duties, VAT, and safety testing standards.



Direct Sectoral Losses due to counterfeiting

The working estimate of the illicit toys and games market stands at R1.9 billion. This siphoning inflicts severe direct damage on the formal economy:

FISCAL LOSSES

R300M – R333M Annual Loss

The national fiscus loses between R300 million and R333 million annually in tax revenue from toys alone, primarily comprising R273 million in uncollected VAT and customs duties.

EMPLOYMENT IMPACT

2,275 Direct Jobs Destroyed

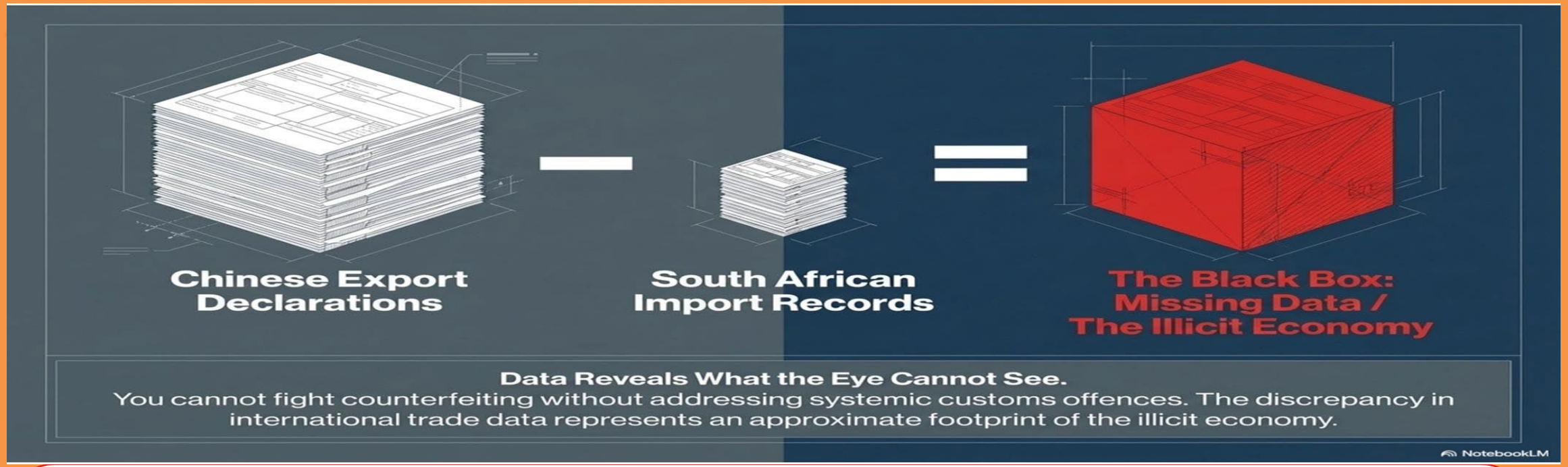
Illicit capture has destroyed 2,275 direct formal and informal jobs.

DETERRENCE OF INVESTMENT

Global Brand Hesitation

SATAGA notes that several leading global toy brand owners hesitate to launch in South Africa due to rampant counterfeiting, creating a structural drag on long-term sector development.

3.3Mirror Trade Analysis



Mirror Trade Discrepancy (The China Corridor — 40% Trade Gap)

Because South Africa imports approximately 75% of its toys & game (predominantly from China), researchers analyzed export-import records. China recorded exporting 40% more toys & games value than South African customs recorded receiving—confirming massive under-declaration, misclassification, smuggling and counterfeit goods.

3.4 Structural Enforcement Gap & Child Safety Hazards

Counterfeit toys & games present immediate biological and physical dangers to children. We have insufficient mandatory health and safety checks for toys & games at South African ports of entry. Consequently, non-compliant products bypass EN 71 / CE safety standards, flooding the market with:

1. Toxic Chemical Exposure

Unregulated concentrations of toxic lead, heavy metals, and phthalates.

2. Physical Hazards

Poor quality products, sharp plastic edges, break and injure risk, potential choking and fire hazards (electronic / battery powered products).

3. Formal Retail Infiltration

Counterfeit toys & games are no longer restricted to the informal sector; they actively infiltrate formal shopping malls, e-commerce platforms, and social media, misleading parents into purchasing dangerous imitations.

3. SECTOR FOCUS: TOYS & GAMES (TABLE 2)

Sector Impact Metrics & Evidence Benchmark

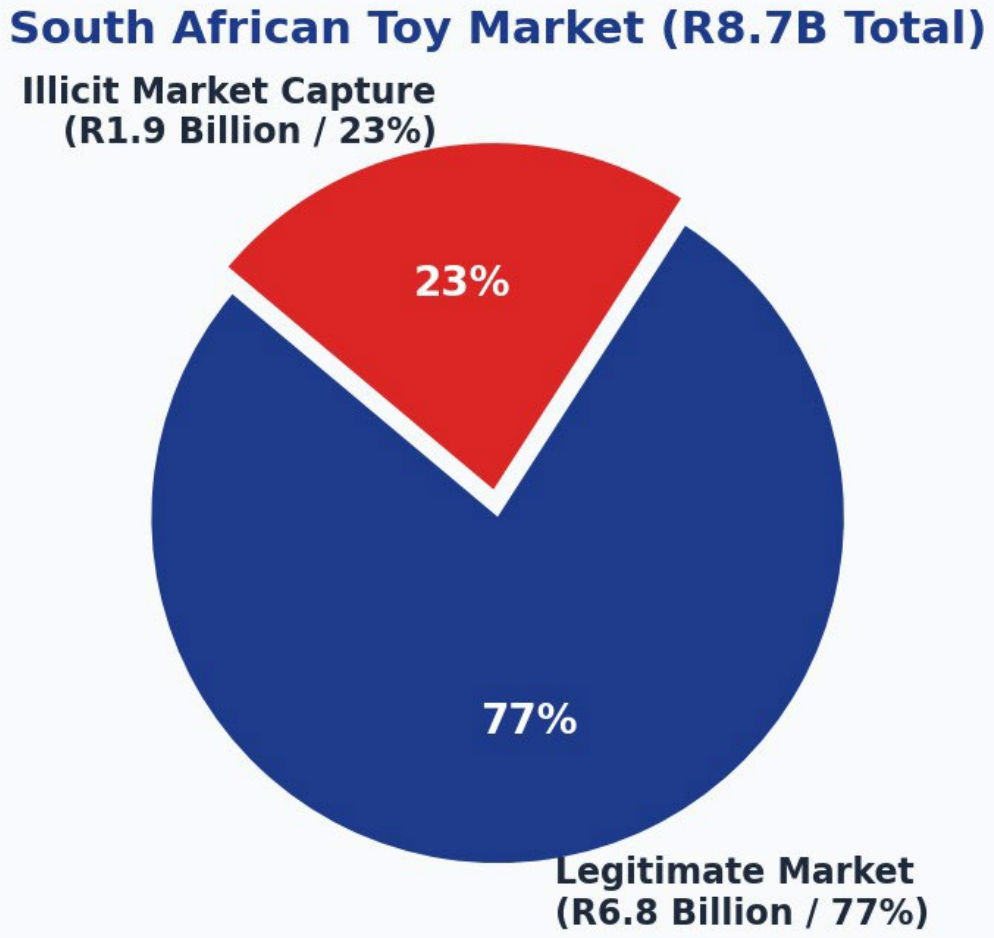
Sector Metric	Current Illicit Impact (2024)	Methodological Source / Evidence
Total Toys & Games Market Baseline	**R8.7 Billion**	IMARC Group research (validated by Stats SA SUT R8.3B)
Counterfeit Toys & Games Market Value	**R1.9 Billion**	Triangulation: SATAGA survey, mirror trade, SUT benchmark
Penetration Rate	**23.0% – 25.0%**	Skyrocketed from 5% (2022) to 15% (2023) and 25% (2024). Estimated at 23% in 2026
Annual Fiscal Tax Loss	**R300M – R333M**	R273m in lost VAT & customs duties + taxes
Direct Jobs Destroyed	**2,275 Jobs**	54.7% in vulnerable, low-skilled retail & distribution
Import Discrepancy	**40% Trade Gap**	China mirror trade analysis showing massive discrepancies

4. Reclaiming R1.9 Billion: The Potential of a Protected Toy Industry

Our message is one of immense economic opportunity. The R1.9 billion currently captured by counterfeiters represents ready-made consumer demand that can be redirected back into legitimate, formal market channels.

Eradicating counterfeit penetration does not require creating new consumer demand from scratch; it requires capturing existing demand. Redirecting R1.9 billion from illicit syndicates to legitimate operators will:

- **Expand Formal Value Chains:** Drive substantial revenue growth across legitimate importers, distributors, wholesalers, and formal retailers.
- **Stimulate Adjacent Business Services:** Expand commercial warehousing, logistics, transport, packaging, marketing, and formal retail store footprints.
- **Recover Tax Revenues:** Restore over R300 million annually to the South African Revenue Service (SARS) to fund vital public infrastructure.



4.2 Unlocking International Brand Entry & Employment Growth

Collaborating to effectively to continuously combat counterfeit toys & games will remove the single greatest barrier to entry for leading global toys & games brandholders. Effective enforcement clears a pathway for legitimate business to grow and will stimulate workforce expansion across the entire formal retail and distribution spectrum.

Sector Dimension	Current Illicit Losses	Future Potential Under Collaborative Defense
Annual Market Revenue	R1.9 Billion lost to illicit operators	**R1.9 Billion redirected to legitimate distributors & retailers**
Fiscal Tax Contribution	R300M – R333M tax revenue lost	**R300M+ recovered annually in VAT, taxes and duties**
Employment Stability	2,275 vulnerable jobs lost	**2,275+ jobs protected + formal store & related industry expansion**
Global Brand Presence	Leading brands hesitate to enter SA	**Unlocks foreign direct investment & official brand launches and presence**
Child Health & Safety	Widespread toxic or hazardous products	**100% compliant, safety-tested products (EN 71 / CE standard)**

5. Why Collaboration is Key: The Engine for Collective Defense

- No single toys or games brandholder, distributor or retailer can combat organized counterfeit syndicates in isolation;
- Public-private enforcement partnerships, policy advocacy, intelligence gathering & sharing and collective meaningful operations are required to effectively combat counterfeiting;
- Collaboration = cost savings for brandholders allowing for more actions to be conducted than if acting alone;
- Prioritizing the protection and enforcement of Intellectual Property Rights will encourage leading international brand owners to launch officially in South Africa, bringing foreign direct investment, expanding consumer choice and creating high-value distribution and retail opportunities.

6. Call to Action for all stakeholders in the toys & games industry:

To capitalize on the immense potential of the South African market, SATAGA calls upon brandholders, distributors, retailers, licensees:

1. Join SATAGA

Become a member, join the collective fight against counterfeits, help grow the legitimate sector and reclaim market share lost to counterfeiting.

2. Combat Counterfeit Goods:

- At Physical Retail: counterfeits are sold openly in mainstream retail spaces;
- On Online Sales Platforms: The sale of counterfeit goods on these platforms has grown exponentially and consistently since covid and is a priority focus area for us leading up to the festive period.

3. Ensure the supply of legitimate products to meet demand:

- Removing counterfeit products is part of the solution;
- Brandholders must ensure the availability of authentic products – failing which the door is opened for counterfeits to meet the demand.

4. Promote Public Awareness

Partner in initiatives to inform the public on the existence and dangers of counterfeit toys & games.

By taking decisive, collaborative action now, we will combat the illicit shadow economy, unlock the full R8.7 billion potential of the South African Toys & Games Industry and protect consumers and children.

National Enforcement Reach: Structured Operations Across Provinces

144
Reported Enforcement Operations
Preceding year operational tally

7 / 9
Provinces Actively Covered
Broad geographic reach across South Africa

2025
National Programme Launch
Expanded framework for sustained action

PROVINCIAL OPERATIONAL FOOTPRINT & COLLABORATION

Gauteng & Western Cape
Commercial hub operations targeting major wholesale markets and independent retailers.

KwaZulu-Natal
Port-adjacent enforcement, warehouse raids, and large-scale party goods seizures.

Eastern Cape, Free State, Mpumalanga & Limpopo
Regional operations tackling inland distribution networks and independent retailers.

Law Enforcement Alliances
Established operational relationships with SAPS, SARS Customs, municipal police, and specialized IP law firms.

Case Study: Simultaneous 6-Premises Raid Seizes R8M in Goods, Recovers Legal Fees, & Wins Guilty Verdicts

62,000
Items Seized
Across 6 premises simultaneously

R6M – R8M
Estimated Value
~US$400,000 total seized value

100%
Legal Fees Covered
Recovered in civil settlement

4 Months
To Criminal Verdict
Company & Director guilty

Case Study: KZN National Distributor Raid

- **Intelligence Led:** Received tip-off regarding counterfeit party goods. Preliminary investigation identified a major national distributor supplying over 20 retail outlets.
- **Cost-Sharing Model:** SATAGA conducted test purchases and partnered with 2 leading brandholders to share operation costs.
- **Simultaneous Execution:** Raid executed simultaneously across 6 premises in KwaZulu Natal, confiscating 62,000 counterfeit items valued between R6M–R8M (~$400,000).
- **100% Civil Recovery:** Civil proceedings settled in full, completely covering all brandholder legal fees and disbursements.
- **Swift Criminal Conviction:** Resolved within 4 months with guilty pleas; both company and director convicted of dealing in counterfeit goods.

END – THANK YOU

SATAGA
SA TOY & GAME ASSOCIATION

info@sataga.org.za

- Follow us on LinkedIn
- Visit our website: www.sataga.org.za

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NÜRNBERG, 2 – 6 FEB 2027

Why is the Spielwarenmesse indispensable to our industry?





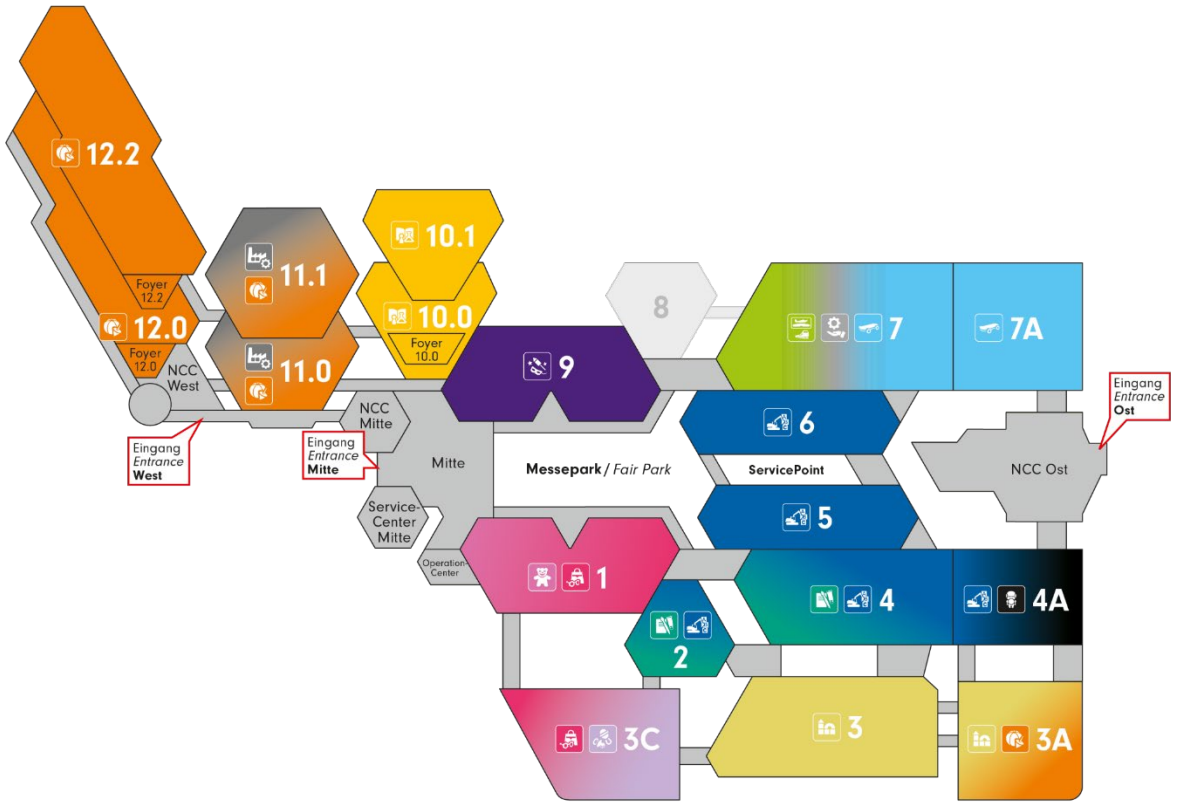
Diverse product range


2,313
Exhibitors
68
Countries
82%
International share



Meeting point for leading brands

14 product groups – endless possibilities

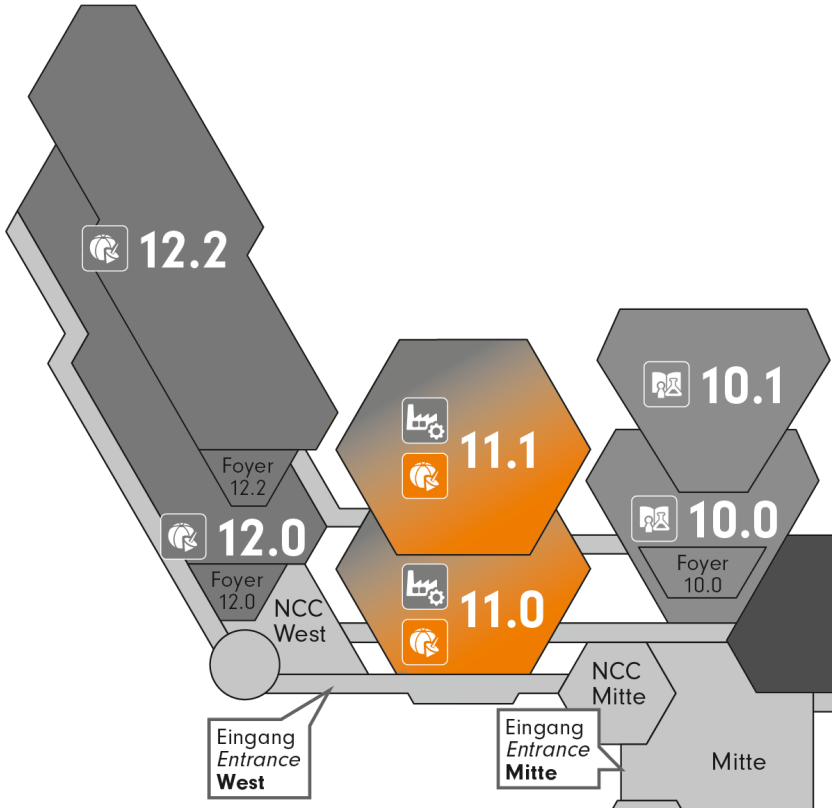


- Lifestyle Products
- Model Construction and Model Railways
- Dolls, Soft Toys
- Sports, Leisure, Outdoor
- Baby and Infant Articles
- Festive Articles, Carnival, Fireworks
- Wooden Toys, Toys made from Sustainable Material
- Games, Books, Learning and Experimenting
- School Articles, Stationery, Creative Design
- Multi-Product Group
- Technical Toys, Educational Toys, Action Toys
- Services for Trade and Industry
- Electronic Toys
- Manufacturing Services

NEW

Manufacturing Services

NEW



Product development and design

Suppliers for raw materials and components

Manufacturing process providers (i.a. wood, metal and plastics processing, electronics, textile and plush manufacturing)


58,941
Visitors
123
Countries
66%
International share

TOP 10 Countries

Germany

Italy

China

Great Britain

Netherlands

France

Spain

Poland

USA

Austria

89% **Proportion of decision-makers**

TOP 5 Visitor Groups

Speciality Stores & Retail Chains

Wholesale & Foreign Trade

Online Trade

Supermarkets & Discounters

Department Stores

Inspiring innovations



Kidults: huge market potential

€5.7 bn
Expenditure on toys by consumers aged 12 and over (EU5* 2025)

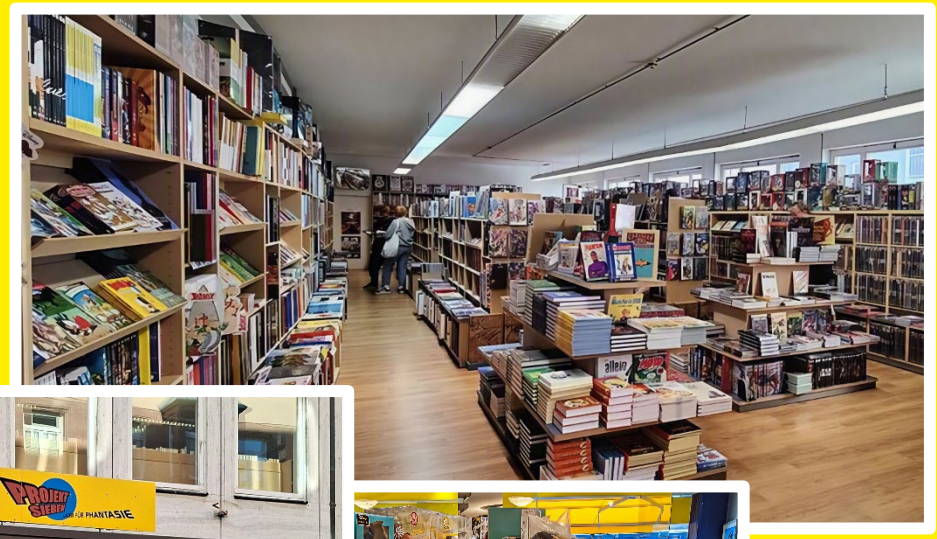
+14%
Growth (EU5* 2025)

32%
of all toy sales in the EU5* countries

Source: Circana
**France, Germany, Italy, Spain, UK*

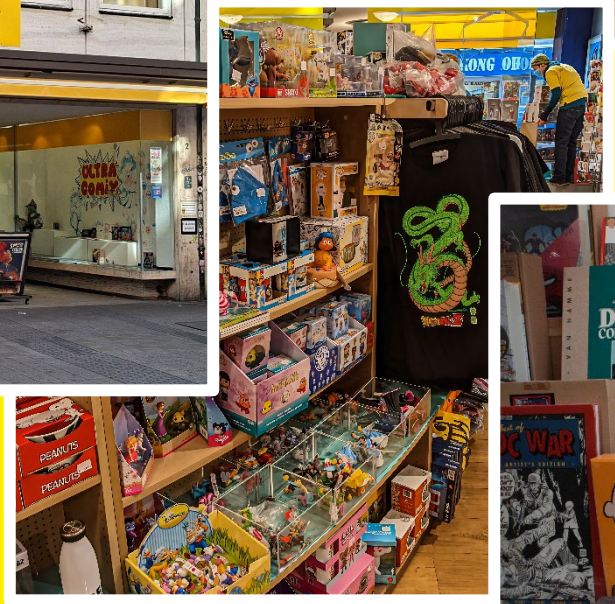














Ultra Comix

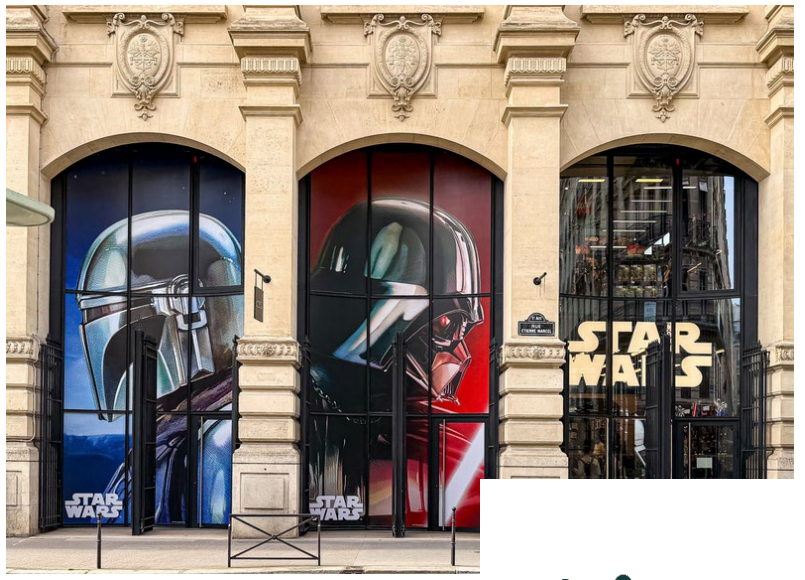
Germany















King Jouet

France







GEEK PLANET

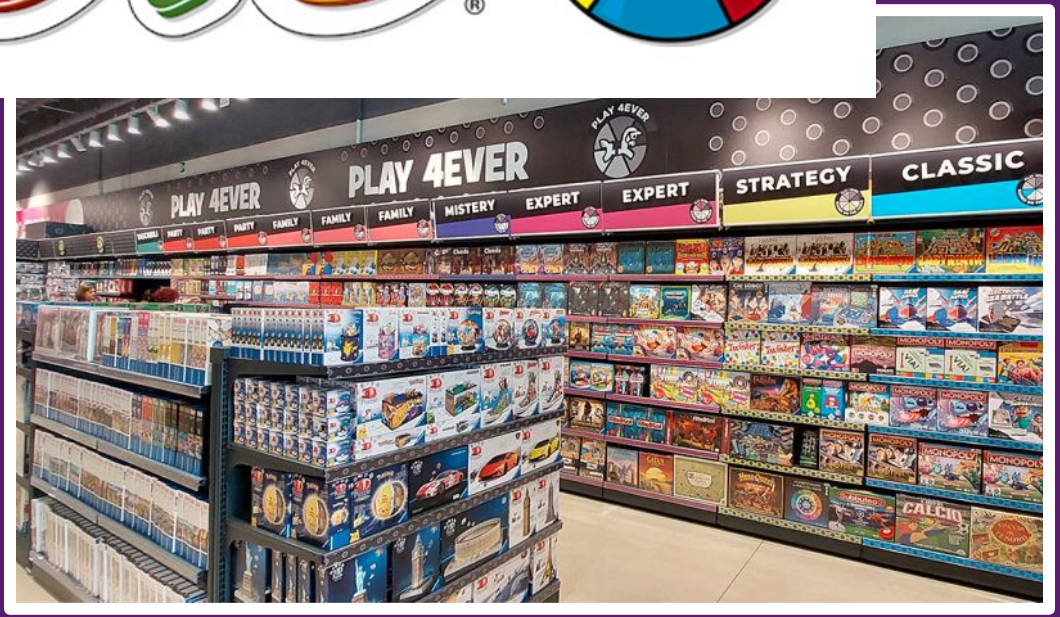
TOY PLANET

Spain

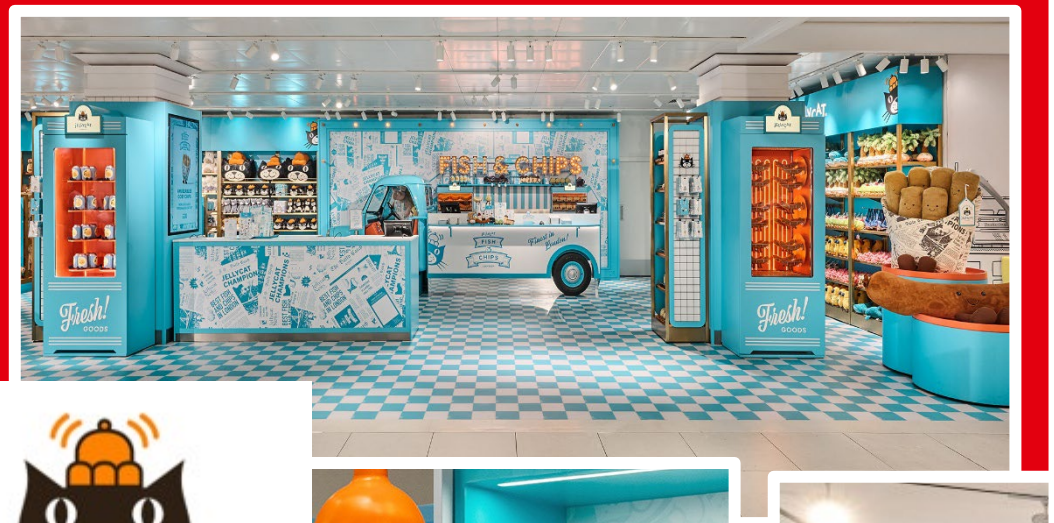


TOYS center





Italy





JELLYCAT
LONDON





UK



Shanghai

London





POP MART



Bangkok







Practical product examples for adult toy fans

From „Collectibles“ and „Tabletop Games“,
„Retro“ to „Creative Fantasy“

In cooperation with Ultra Comix SPIEL Essen

TOYS FOR KIDULTS

Entrance Mitte

TOY TRENDS



Key trends shaping future-focused assortments

Insights from twelve trend scouts from ten countries

Entrance Mitte

BEYOND LIMITS

Toys with therapeutic potential – regardless of age

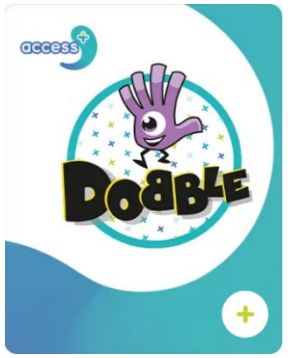
Support and rehabilitation of cognitive, motor and sensory skills

Unique texture and size

Promoting social participation



Sensory Activity Board – Miniland mind & move



Dobble – Asmodee access+



Jispring Puzzle Games – Paisen Household



Fidget Toys for Elderly – Odoxia

Licensed classics from series, games and films

Social media as a source of inspiration: viral memes, GIFs and clips

Asian brands becoming part of the global mainstream

Cross-platform fandom activation for year-round purchase occasions

LICENSE TO PLAY



Bad Date Bears – The Bad Date Bears



Pembe the Pink Cat – Boti



Super Mario Galaxy Memory – Ravensburger



KPop Demon Hunters Fashion Doll – Mattel



Over 100 new products – all in one place

Sustainable Collection: sustainable product innovations at a glance

NEW PRODUCT GALLERY



Innovative products and creative play concepts from emerging talents worldwide

STARTUP AREA

Hall 3A



Outstanding new products with strong market potential

Valuable guidance for retailers

Baby & Infant, PreSchool, SchoolKids, Teenager & Adult, Startup, Sustainability

Registration deadline: 23 Nov 2026

Hall 3A







Current trends in the Sports, Leisure and Outdoor segment

Action across 400 sqm: experience and test new releases live

Hall 7A

SPECIAL



GAME INVENTORS CONVENTION

NÜRNBERG | FRIDAY 5TH FEB 2027

Showcase and discover the game hits of tomorrow

Partnership with

PUBBLO NEW

156 Participants*

22 Countries*

*2026

Friday,
5 Feb 2027



Immersive networking experiences

LICENSE LOUNGE

powered by BRANDmania

Networking area for the international licensing community

5,300+

Visitors with a primary interest in licences

Foyer Entrance West



LET´S CONNECT!

Toy Community Meetup



Connect and exchange in a relaxed atmosphere

Informal sessions on current topics:

Kidults & Fandom, Startups, AI in Retail and Industry, Out of the Box Ideas for your Product Range





TOY NIGHT

Tuesday,
2 Feb 2027

Red Night

Thursday,
4 Feb 2027







Latest Toy Insights



TOY BUSINESS FORUM

ToyPitch, live podcasts, panel talks and trendsetting presentations

From industry and retail trends, AI and sustainability to Kidults

„From digital dream to real future“ *(Collin Croome, Future Expert),*
„More than selling – The new business models of stationary retail“ *(Marilyn Repp, Retail Expert)*

After Hour: Networking Break on Tuesday and Wednesday

NEW

Hall 3A



LICENSE TALKS 2027

LICENSING INTERNATIONAL

BR/ND M/NIA

Exciting insights into current trends and valuable expertise

Active discussions and direct exchange with speakers

Toy Business Forum,
Hall 3A



value of play conference

Focus on the cultural, educational and scientific facets of play

Play based learning for all age groups
Mital Salia, Game Therapist, Mumbai

Gamification in higher education
Prof. Dominik Merli, Technical University of Applied Sciences Augsburg

Playgrounds for Kidults
Dr. Michael Kienreich, Owner of Sinnspiel.at, University of Graz

Inclusive game design
Prof. Alessandro Rizzi, University of Milano

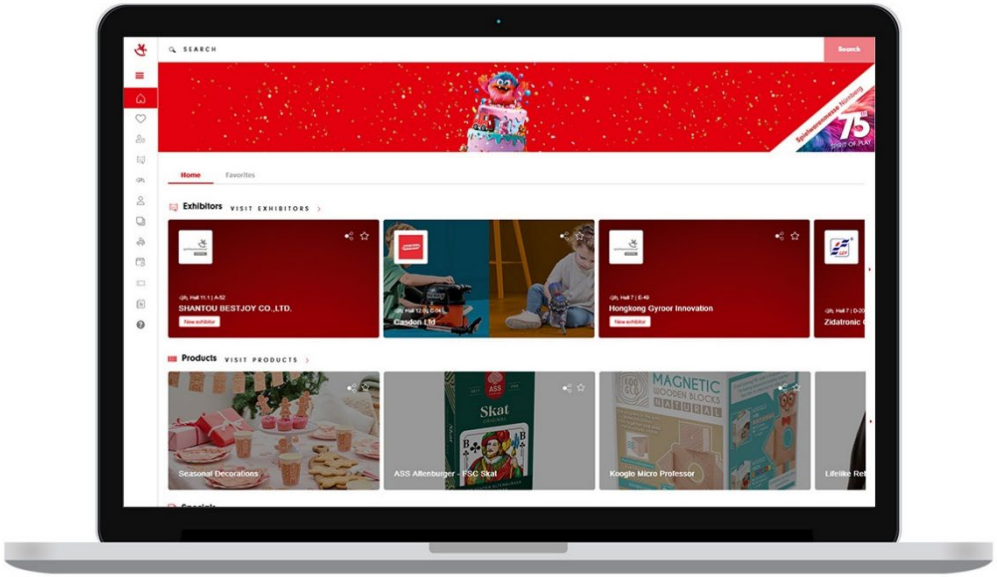
Wednesday,
3 Feb 2027



Services







Greater reach for exhibitors

Prominent secondary placements: Specials by Spielwarenmesse

Complimentary customer invitations and comprehensive communications kit

Informative company profile on Spielwarenmesse Digital

On-site and digital advertising measures

Press services

Everything for media representatives

Don‘t miss it:

Main Press Conference
on 28 Jan 2027

PressDay with ToyPitch, TrendTour and exhibitor activities

Well informed:

What‘s New Guide

Press boxes







Opening hours

Tuesday to Friday
9 am – 6 pm

Saturday
9 am – 2 pm

NEW



Tickets and accreditation

Start: 4 Nov 2026

Available online





Scan. Discover. Stay informed.

Our digital information package

Exclusive Talk by Circana:
Global Toy Market Overview

SPIELWARENMESSE GROUP

Largest network of the worldwide toy community



SPIEL Essen®

World's largest consumer trade fair for board games

997 exhibitors and
230,000 visitors*

*2026

Direct sales at exhibitors' stands

21 – 24 Oct 2027 in Essen

BRAND MANIA

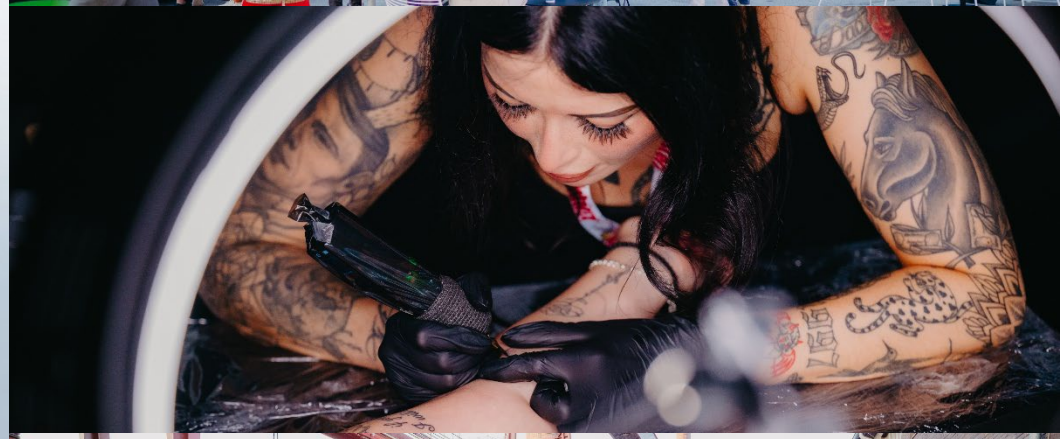
Largest B2B networking event for licensing, brands and collabs

Ca. 1,000 participants* *2026

Entertainment, fashion, food, gaming, media, publishing, toys, sports

23 – 24 Jun 2027 in Essen







WORLD OF TOYS
by SPIELWARENMESSE GROUP

Tapping into fastest-growing markets and accelerate expansion

International trade fair presence made easy with joint stands

kids India

HKTDC 香港玩具展

enter TOY ment

toyFAIR!



Trade Fairs
Competence Centre

CONNECTING MARKETS
CREATING OPPORTUNITIES

- Platform to Global Markets
- International Business Partnerships
- Market Access and Growth
- Knowledge and Innovation
- People



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WHAT WE DO

Auf zu neuen Märkten. AHK

MISSION

Facilitating international market access for Southern African businesses through leading German Trade Fairs.



AHK Deutsche Auslandshandelskammern German Chambers of Commerce Abroad

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AHK-SA & SPIELWARENMESSE PARTNERSHIP

- **We help Southern African companies:**
  - Register as trade visitors
  - Exhibit at the fair
  - Prepare for travel
- **Why attend?**
  - Source from global toy manufacturers
  - Discover new products and market trends
  - Meet distributors, retailers and partners
- **Event details**
  - 2–6 February 2027
  - Nürnberg Exhibition Centre, Germany



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PLANNING AHEAD TRAVEL CHECKLIST

Plan early for a smoother trip

- 6 months before — confirm passport validity
- 3 months before — apply for a Schengen visa and reserve accommodation
- 2–3 months before — book flights and purchase travel insurance
- 1 month before — schedule exhibitor meetings and download local transport information

Best advice

- Secure visa appointments and accommodation as early as possible.



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VISA REQUIREMENTS

For South African passport holders

- A Schengen business visa is required for travel to Germany.

Prepare these documents

- Valid passport and completed visa application forms
- Invitation or proof of exhibition attendance
- Flight and hotel reservations
- Travel insurance and proof of sufficient funds

Apply early

- Submit your application 8–12 weeks before departure to reduce the risk of delays.

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ACCOMMODATION MADE EASY!

Book through Revolugo

- The official accommodation partner for Spielwarenmesse 2027.

Why use the platform

- Easy & User-Friendly System
- Book hotels in Nürnberg and nearby areas online
- Compare locations using an interactive map
- Choose hotels with convenient public transport access

Contact Revolugo Team

- Email: reservations@revolugo.com
- Phone: +33 (0)1 80 06 62 88



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FLIGHTS & TRAVEL OFFERS

Fly to Spielwarenmesse at a Reduced Price with Turkish Airlines!



Exclusive Visitor Benefits

- Up to 15% discount on Economy Class fares
- Up to 20% discount on Business Class fares
- Travel period: 26 January-13 February 2027

Airports

- Nürnberg Airport (NUE)
- Munich Airport (MUC)



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GETTING AROUND DURING THE FAIR

Public Transport Made Simple

Your Spielwarenmesse ticket includes free travel on public transport throughout the wider Nürnberg region.

Available Transport

- 🚇 U-Bahn (Metro)
- 🚆 S-Bahn (Regional Rail)
- 🚌 Bus Services
- 🚋 Trams

Why This Matters

- Stay outside Nürnberg and save on accommodation.
- Easy access to the exhibition grounds.



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CONCLUSION

Make the Most of Your Spielwarenmesse 2027 Experience

- Secure your visa early
- Book accommodation through Revolugo
- Take advantage of Turkish Airlines offers
- Schedule meetings before arriving

Need Assistance?

- **AHK Southern Africa** is here to support your journey to Spielwarenmesse 2027.

Save the date: The ticket shop for Spielwarenmesse 2027 opens on 4 November 2026!

Thank You

AHK Southern Africa - Trade Fair Competence Centre

"Your gateway to the world's leading trade fairs and international business opportunities."

Contact: Knowledge Tenza
Trade Fair Competence Centre
Southern African-German Chamber of Commerce & Industry - NPC

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Nürnberg 2 – 6 Feb 2027