

# **Claw Machine Market – Global Industry Size, Share, Trends, Opportunity and Forecast, Segmented By Type of Machine (Traditional Claw Machines, Modern Claw Machines), By Prize Type (Plush Toys, Electronics, Candy & Treats, Others), By Distribution Channel (Online, Offline), By Region & Competition, 2021-2031F**

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## **Abstracts**

The global claw machine market is projected to expand from USD 1.78 billion in 2025 to USD 2.31 billion by 2031, demonstrating a compound annual growth rate (CAGR) of 4.44%. This market encompasses the production, distribution, and operation of skill-based amusement devices where individuals use a mechanical claw to obtain prizes. Key drivers for this growth include the rapid proliferation of family entertainment centers and the widespread adoption of cashless payment systems, both of which enhance user access and operational efficiency. These advancements enable operators to simplify transactions and position machines in various high-traffic locations, attracting a wider audience beyond traditional arcade patrons. The economic impact of this sector is significant in major markets, with prize games contributing over 60% of total revenue in Japan's amusement facilities in 2025, as reported by the Japan Amusement Industry Association. However, the market's robust growth is challenged by diverse and strict government regulations concerning prize value limits and the classification of games as gambling, which impose complex compliance demands and can hinder market expansion in areas with stricter laws.

## **Market Driver**

Market growth is primarily propelled by the expansion of Family Entertainment Centers

(FECs) and the worldwide spread of modern, Asian-style arcade concepts. Operators are actively transforming conventional game rooms into expansive experiential destinations, successfully introducing the "UFO Catcher" phenomenon to global markets such as North America. This approach has proven highly successful in attracting visitors and generating consistent revenue by establishing claw machines as key attractions. For instance, Round One Corporation's revenue for the fiscal year ending March 31, 2025, increased by 11.2% year-on-year to 177 billion yen, largely due to the extensive installation of crane game machines and the expansion of its US store network, as stated in their November 2025 'Integrated Report 2025'. Further reflecting this operational scalability, GENDA Inc. reported a 49% year-over-year revenue surge to 73.9 billion yen in their September 2025 'Q2 FY2026/1 Financial Results', highlighting the significant financial promise of prize-based amusement. Another crucial driver is the incorporation of popular licensed intellectual property (IP), which redefines the appeal of claw machines by emphasizing exclusive rewards over the gameplay itself. Manufacturers are increasingly partnering with popular anime and gaming franchises to create limited-edition prizes, encouraging repeat play and higher earnings per machine. This content-led strategy has reinvigorated hardware sales and usage, as consumers are motivated by desirable merchandise rather than just the game mechanism. Capcom Co., Ltd.'s Amusement Equipments segment saw net sales reach 15,191 million yen for the six months ending September 30, 2025, a substantial 378.3% year-on-year increase, driven by the strong demand for new prize game machines, as detailed in their October 2025 'Consolidated Financial Results'. This collaboration between hardware and IP ensures ongoing consumer interest by continually updating incentives.

## **Market Challenge**

Strict and inconsistent government regulations concerning prize limits and the definition of gambling pose a significant structural obstacle to the global claw machine market. When laws impose tight restrictions on the wholesale value of prizes, players' perception of value for money decreases, directly reducing machine usage and revenue per unit. Additionally, the lack of a clear, universal distinction between skill-based amusement and chance-based gambling leads to considerable legal uncertainty. This ambiguity compels operators to manage intricate, region-specific compliance rules, which often require expensive modifications to equipment or completely prevent market entry in areas where this distinction is unclear. The adverse effects of these restrictive legal frameworks are evident in recent enforcement actions that curtail operational flexibility. For instance, in 2024, the American Gaming Association reported that regulatory efforts to curb unregulated skill-based gaming devices led to targeted enforcement across eight specific U.S. jurisdictions. This illustrates the instability

operators encounter, as the possibility of machines being legally reclassified as gambling devices limits their deployment in typical high-traffic family entertainment centers. Therefore, compliance demands and the threat of asset confiscation effectively hinder vendors' efforts to expand their customer base in regions with stricter regulatory oversight.

## **Market Trends**

A key trend is the adoption of app-based remote control gameplay models, which are fundamentally transforming market accessibility by separating gameplay from a physical location. Operators are increasingly utilizing low-latency video streaming to enable users to control physical claw machines remotely through mobile applications, thereby engaging a digital-native demographic that might not visit traditional arcades. This "Online Claw" model not only generates a continuous 24/7 revenue stream but also facilitates international service delivery, considerably broadening the market beyond local foot traffic. The financial success of this hybrid strategy is evident in the substantial growth of major aggregators; for example, GENDA Inc. reported a consolidated revenue of 111.7 billion yen in their March 2025 'FY1/25 Financial Results', a achievement largely attributed to the aggressive expansion of their entertainment platform that combines online crane game operations with conventional facility management. Concurrently, the implementation of IoT telemetry for real-time machine management is enhancing operational efficiency by supplying operators with detailed data on machine status and inventory. Advanced telemetry modules now provide immediate updates on prize levels, mechanical issues, and coin-hopper status, enabling predictive maintenance and efficient route planning for service personnel. This data-driven system markedly reduces machine downtime and labor expenses, while ensuring a reliable user experience through fewer malfunctions. The widespread adoption of this technology is highlighted in the support sector; Nayax Ltd.'s March 2025 'Fourth Quarter and Full Year 2024 Results' showed that the total number of managed and connected devices reached approximately 1.26 million, a 21% year-on-year increase, driven by strong demand for connected unattended retail and amusement solutions.

## **Key Market Players**

Elaut NV

Guangzhou Taikongyi Amusement Technology Co., Ltd

Coast to Coast Entertainment

H. Betti Industries Inc.

Gumball.com

Neofuns Amusement Equipment Co., Ltd

MarweyGame

Guangzhou Unique Animation Technology Co., Ltd

Hsiang Neng DC Micro Motor Manufacturing Corporation

Guangzhou EPARK Electronic Technology Co.,Ltd

## **Report Scope**

In this report, the Global Claw Machine Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Claw Machine Market, By Type of Machine

Traditional Claw Machines

Modern Claw Machines

Claw Machine Market, By Prize Type

Plush Toys

Electronics

Candy & Treats

Others

Claw Machine Market, By Distribution Channel

Online

Offline

## Claw Machine Market, By Region

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

### **Competitive Landscape**

Company Profiles: Detailed analysis of the major companies present in the Global Claw Machine Market.

### **Available Customizations:**

Global Claw Machine Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

### **Company Information**

Detailed analysis and profiling of additional market players (up to five).

## Contents

### 1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
  - 1.2.1. Markets Covered
  - 1.2.2. Years Considered for Study
  - 1.2.3. Key Market Segmentations

### 2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

### 3. EXECUTIVE SUMMARY

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, Trends

### 4. VOICE OF CUSTOMER

### 5. GLOBAL CLAW MACHINE MARKET OUTLOOK

- 5.1. Market Size & Forecast
  - 5.1.1. By Value
- 5.2. Market Share & Forecast
  - 5.2.1. By Type of Machine (Traditional Claw Machines, Modern Claw Machines)
  - 5.2.2. By Prize Type (Plush Toys, Electronics, Candy & Treats, Others)
  - 5.2.3. By Distribution Channel (Online, Offline)
  - 5.2.4. By Region

- 5.2.5. By Company (2025)
- 5.3. Market Map

## **6. NORTH AMERICA CLAW MACHINE MARKET OUTLOOK**

- 6.1. Market Size & Forecast
  - 6.1.1. By Value
- 6.2. Market Share & Forecast
  - 6.2.1. By Type of Machine
  - 6.2.2. By Prize Type
  - 6.2.3. By Distribution Channel
  - 6.2.4. By Country
- 6.3. North America: Country Analysis
  - 6.3.1. United States Claw Machine Market Outlook
    - 6.3.1.1. Market Size & Forecast
      - 6.3.1.1.1. By Value
    - 6.3.1.2. Market Share & Forecast
      - 6.3.1.2.1. By Type of Machine
      - 6.3.1.2.2. By Prize Type
      - 6.3.1.2.3. By Distribution Channel
  - 6.3.2. Canada Claw Machine Market Outlook
    - 6.3.2.1. Market Size & Forecast
      - 6.3.2.1.1. By Value
    - 6.3.2.2. Market Share & Forecast
      - 6.3.2.2.1. By Type of Machine
      - 6.3.2.2.2. By Prize Type
      - 6.3.2.2.3. By Distribution Channel
  - 6.3.3. Mexico Claw Machine Market Outlook
    - 6.3.3.1. Market Size & Forecast
      - 6.3.3.1.1. By Value
    - 6.3.3.2. Market Share & Forecast
      - 6.3.3.2.1. By Type of Machine
      - 6.3.3.2.2. By Prize Type
      - 6.3.3.2.3. By Distribution Channel

## **7. EUROPE CLAW MACHINE MARKET OUTLOOK**

- 7.1. Market Size & Forecast
  - 7.1.1. By Value

- 7.2. Market Share & Forecast
  - 7.2.1. By Type of Machine
  - 7.2.2. By Prize Type
  - 7.2.3. By Distribution Channel
  - 7.2.4. By Country
- 7.3. Europe: Country Analysis
  - 7.3.1. Germany Claw Machine Market Outlook
    - 7.3.1.1. Market Size & Forecast
      - 7.3.1.1.1. By Value
    - 7.3.1.2. Market Share & Forecast
      - 7.3.1.2.1. By Type of Machine
      - 7.3.1.2.2. By Prize Type
      - 7.3.1.2.3. By Distribution Channel
  - 7.3.2. France Claw Machine Market Outlook
    - 7.3.2.1. Market Size & Forecast
      - 7.3.2.1.1. By Value
    - 7.3.2.2. Market Share & Forecast
      - 7.3.2.2.1. By Type of Machine
      - 7.3.2.2.2. By Prize Type
      - 7.3.2.2.3. By Distribution Channel
  - 7.3.3. United Kingdom Claw Machine Market Outlook
    - 7.3.3.1. Market Size & Forecast
      - 7.3.3.1.1. By Value
    - 7.3.3.2. Market Share & Forecast
      - 7.3.3.2.1. By Type of Machine
      - 7.3.3.2.2. By Prize Type
      - 7.3.3.2.3. By Distribution Channel
  - 7.3.4. Italy Claw Machine Market Outlook
    - 7.3.4.1. Market Size & Forecast
      - 7.3.4.1.1. By Value
    - 7.3.4.2. Market Share & Forecast
      - 7.3.4.2.1. By Type of Machine
      - 7.3.4.2.2. By Prize Type
      - 7.3.4.2.3. By Distribution Channel
  - 7.3.5. Spain Claw Machine Market Outlook
    - 7.3.5.1. Market Size & Forecast
      - 7.3.5.1.1. By Value
    - 7.3.5.2. Market Share & Forecast
      - 7.3.5.2.1. By Type of Machine

- 7.3.5.2.2. By Prize Type
- 7.3.5.2.3. By Distribution Channel

## **8. ASIA PACIFIC CLAW MACHINE MARKET OUTLOOK**

- 8.1. Market Size & Forecast
  - 8.1.1. By Value
- 8.2. Market Share & Forecast
  - 8.2.1. By Type of Machine
  - 8.2.2. By Prize Type
  - 8.2.3. By Distribution Channel
  - 8.2.4. By Country
- 8.3. Asia Pacific: Country Analysis
  - 8.3.1. China Claw Machine Market Outlook
    - 8.3.1.1. Market Size & Forecast
      - 8.3.1.1.1. By Value
    - 8.3.1.2. Market Share & Forecast
      - 8.3.1.2.1. By Type of Machine
      - 8.3.1.2.2. By Prize Type
      - 8.3.1.2.3. By Distribution Channel
  - 8.3.2. India Claw Machine Market Outlook
    - 8.3.2.1. Market Size & Forecast
      - 8.3.2.1.1. By Value
    - 8.3.2.2. Market Share & Forecast
      - 8.3.2.2.1. By Type of Machine
      - 8.3.2.2.2. By Prize Type
      - 8.3.2.2.3. By Distribution Channel
  - 8.3.3. Japan Claw Machine Market Outlook
    - 8.3.3.1. Market Size & Forecast
      - 8.3.3.1.1. By Value
    - 8.3.3.2. Market Share & Forecast
      - 8.3.3.2.1. By Type of Machine
      - 8.3.3.2.2. By Prize Type
      - 8.3.3.2.3. By Distribution Channel
  - 8.3.4. South Korea Claw Machine Market Outlook
    - 8.3.4.1. Market Size & Forecast
      - 8.3.4.1.1. By Value
    - 8.3.4.2. Market Share & Forecast
      - 8.3.4.2.1. By Type of Machine

- 8.3.4.2.2. By Prize Type
- 8.3.4.2.3. By Distribution Channel
- 8.3.5. Australia Claw Machine Market Outlook
  - 8.3.5.1. Market Size & Forecast
    - 8.3.5.1.1. By Value
  - 8.3.5.2. Market Share & Forecast
    - 8.3.5.2.1. By Type of Machine
    - 8.3.5.2.2. By Prize Type
    - 8.3.5.2.3. By Distribution Channel

## **9. MIDDLE EAST & AFRICA CLAW MACHINE MARKET OUTLOOK**

- 9.1. Market Size & Forecast
  - 9.1.1. By Value
- 9.2. Market Share & Forecast
  - 9.2.1. By Type of Machine
  - 9.2.2. By Prize Type
  - 9.2.3. By Distribution Channel
  - 9.2.4. By Country
- 9.3. Middle East & Africa: Country Analysis
  - 9.3.1. Saudi Arabia Claw Machine Market Outlook
    - 9.3.1.1. Market Size & Forecast
      - 9.3.1.1.1. By Value
    - 9.3.1.2. Market Share & Forecast
      - 9.3.1.2.1. By Type of Machine
      - 9.3.1.2.2. By Prize Type
      - 9.3.1.2.3. By Distribution Channel
  - 9.3.2. UAE Claw Machine Market Outlook
    - 9.3.2.1. Market Size & Forecast
      - 9.3.2.1.1. By Value
    - 9.3.2.2. Market Share & Forecast
      - 9.3.2.2.1. By Type of Machine
      - 9.3.2.2.2. By Prize Type
      - 9.3.2.2.3. By Distribution Channel
  - 9.3.3. South Africa Claw Machine Market Outlook
    - 9.3.3.1. Market Size & Forecast
      - 9.3.3.1.1. By Value
    - 9.3.3.2. Market Share & Forecast
      - 9.3.3.2.1. By Type of Machine

- 9.3.3.2.2. By Prize Type
- 9.3.3.2.3. By Distribution Channel

## **10. SOUTH AMERICA CLAW MACHINE MARKET OUTLOOK**

- 10.1. Market Size & Forecast
  - 10.1.1. By Value
- 10.2. Market Share & Forecast
  - 10.2.1. By Type of Machine
  - 10.2.2. By Prize Type
  - 10.2.3. By Distribution Channel
  - 10.2.4. By Country
- 10.3. South America: Country Analysis
  - 10.3.1. Brazil Claw Machine Market Outlook
    - 10.3.1.1. Market Size & Forecast
      - 10.3.1.1.1. By Value
    - 10.3.1.2. Market Share & Forecast
      - 10.3.1.2.1. By Type of Machine
      - 10.3.1.2.2. By Prize Type
      - 10.3.1.2.3. By Distribution Channel
  - 10.3.2. Colombia Claw Machine Market Outlook
    - 10.3.2.1. Market Size & Forecast
      - 10.3.2.1.1. By Value
    - 10.3.2.2. Market Share & Forecast
      - 10.3.2.2.1. By Type of Machine
      - 10.3.2.2.2. By Prize Type
      - 10.3.2.2.3. By Distribution Channel
  - 10.3.3. Argentina Claw Machine Market Outlook
    - 10.3.3.1. Market Size & Forecast
      - 10.3.3.1.1. By Value
    - 10.3.3.2. Market Share & Forecast
      - 10.3.3.2.1. By Type of Machine
      - 10.3.3.2.2. By Prize Type
      - 10.3.3.2.3. By Distribution Channel

## **11. MARKET DYNAMICS**

- 11.1. Drivers
- 11.2. Challenges

## **12. MARKET TRENDS & DEVELOPMENTS**

- 12.1. Merger & Acquisition (If Any)
- 12.2. Product Launches (If Any)
- 12.3. Recent Developments

## **13. GLOBAL CLAW MACHINE MARKET: SWOT ANALYSIS**

## **14. PORTER'S FIVE FORCES ANALYSIS**

- 14.1. Competition in the Industry
- 14.2. Potential of New Entrants
- 14.3. Power of Suppliers
- 14.4. Power of Customers
- 14.5. Threat of Substitute Products

## **15. COMPETITIVE LANDSCAPE**

- 15.1. Elaut NV
  - 15.1.1. Business Overview
  - 15.1.2. Products & Services
  - 15.1.3. Recent Developments
  - 15.1.4. Key Personnel
  - 15.1.5. SWOT Analysis
- 15.2. Guangzhou Taikongyi Amusement Technology Co., Ltd
- 15.3. Coast to Coast Entertainment
- 15.4. H. Betti Industries Inc.
- 15.5. Gumball.com
- 15.6. Neofuns Amusement Equipment Co., Ltd
- 15.7. MarweyGame
- 15.8. Guangzhou Unique Animation Technology Co., Ltd
- 15.9. Hsiang Neng DC Micro Motor Manufacturing Corporation
- 15.10. Guangzhou EPARK Electronic Technology Co.,Ltd

## **16. STRATEGIC RECOMMENDATIONS**

## **17. ABOUT US & DISCLAIMER**

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