Casino Gaming Equipment Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> **Industry:** Casino, Gaming & Entertainment (Hospitality & Tourism)
> **Source:** https://www.mordorintelligence.com/industry-reports/global-casino-gaming-equipment-market
> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 12.54 billion
Projected Forecast (2031)	USD 12.54 billion
Growth Rate (CAGR)	6.19 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

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![Major players in Casino Gaming Equipment industry](images/chart_2.png)

![Casino Gaming Equipment Market (2026 - 2031)](images/chart_3.png)

![Casino Gaming Equipment Market: Market Share by Product Type](images/chart_4.png)

![Casino Gaming Equipment Market: Market Share by Mode of Operation](images/chart_5.png)

![Casino Gaming Equipment Market CAGR (%), Growth Rate by Region](images/chart_6.png)

![Casino Gaming Equipment Market](images/chart_7.png)

![Icon](images/chart_8.png)

![footer background image](images/chart_10.png)

![Mordor Intelligence on Facebook](images/chart_12.svg)

![Mordor Intelligence on Pinterest](images/chart_14.svg)

![Mordor Intelligence on Instagram](images/chart_15.svg)

![ESOMAR](images/chart_17.png)

![GPTW](images/chart_19.png)
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Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market OverviewStudy Period | 2021 - 2031 |
Market Size (2026) | USD 12.54 Billion |
Market Size (2031) | USD 16.93 Billion |
Growth Rate (2026 - 2031) | 6.19 % |
Fastest Growing Market | Asia-Pacific |
Largest Market | North America |
Market Concentration | High |

Major Players*Disclaimer: Major Players sorted in no particular order

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Market Overview

Casino Gaming Equipment Market Analysis by Mordor IntelligenceThe Global Casino Gaming Equipment Market was valued at USD 11.82 billion in 2025 and estimated to grow from USD 12.54 billion in 2026 to reach USD 16.93 billion by 2031, at a CAGR of 6.19% during the forecast period (2026-2031). This market plays a critical role in modern casino tourism, driven by new resort developments, floor upgrades, and software modernization, all reliant on timely equipment procurement. Demand is supported by a surge in integrated resort construction, updates to aging slot floors in established regions, and a shift toward cloud-based casino management systems. The 2026 order book includes equipment deliveries for long-term Asia-Pacific projects, with procurement cycles of 18 to 36 months providing suppliers with extended demand visibility. Operators increasingly value suppliers offering integrated solutions, combining cabinets, payments, analytics, surveillance, and loyalty systems. This trend favors large global vendors and highlights a shift in procurement decisions toward long-term operational compatibility rather than standalone machine performance.

Key Report Takeaways* By product type, gaming machines led with 41.82% share of the Global Casino Gaming Equipment Market in 2025, while casino management systems are forecast to expand at a 7.35% CAGR through 2031.
* By installation, inside-casino deployments held 85.91% share of the Global Casino Gaming Equipment Market in 2025, while outside-casino channels are projected to grow at a 6.47% CAGR through 2031.
* By mode of operation, floor-mounted equipment accounted for 83.63% share of the Global Casino Gaming Equipment Market in 2025, while portable units are forecast to rise at a 6.93% CAGR through 2031.
* By end user, casinos represented 56.12% share of the Global Casino Gaming Equipment Market in 2025, while the cruise ship segment is expected to expand to a 7.64% CAGR through 2031.
* By geography, North America held 34.76% share of the Global Casino Gaming Equipment Market in 2025, while Asia-Pacific is forecast to grow at a 6.68% CAGR through 2031.

Key Market Trends

Market Trends and InsightsDrivers Impact Analysis of Casino Gaming Equipment Market*

Drivers	(~) % Impact on CAGR Forecast	Geographic Relevance	Impact Timeline
Gambling legalization and integrated resort expansion	+2.1%	Global, with primary gains in Asia-Pacific, the Middle East, and South America	Long term (≥ 4 years)
Slot floor refresh and premium cabinet replacement	+1.5%	North America and Europe, with spillover to Oceania	Medium term (2-4 years)
Casino digitalization and cashless wallet enablement	+1.2%	North America and Australia, with rising adoption in Europe and Asia-Pacific	Medium term (2-4 years)
Surveillance, analytics, and casino management system modernization	+1.0%	Global, with early gains in the United States, Macau, South Korea, and Australia	Long term (≥ 4 years)
Faster Nevada device approval cycles	+0.4%	North America, with secondary influence on markets that reference Nevada standards	Short term (≤ 2 years)
Thailand integrated resort pipeline	+0.3%	Southeast Asia and broader Asia-Pacific	Long term (≥ 4 years)

Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

The casino gaming equipment market is highly concentrated, with a small group of suppliers dominating the market. Aristocrat Gaming, Light & Wonder, IGT, Konami Gaming, and Everi have maintained their position by effectively managing approvals, service networks, product roadmaps, and procurement cycles across various jurisdictions. This concentration provides an advantage, as larger suppliers collaborate with operators to support integrated systems rather than focusing solely on hardware sales. Vendors offering a combination of cabinets, software, analytics, cashless solutions, and compliance tools on a unified platform are becoming increasingly significant, benefiting companies with both scale and software expertise.

Apollo Global Management completed a major acquisition of IGT's Gaming and Digital business along with Everi Holdings, creating a combined enterprise centered on Gaming, Digital, and FinTech operations. This move underscored the growing importance of software, digital solutions, and payment systems in the competitive landscape. Aristocrat expanded its capabilities through agreements and acquisitions, extending its focus beyond cabinets to include digital engagement and operational intelligence. Everi, following the Apollo transaction, transitioned from an independent public company but retained relevance in specific payments and gaming areas. These developments highlight the increasing importance of ownership changes, software capabilities, and payment integration over hardware catalog breadth.

Competition below the top tier remains active but is concentrated in specific categories and regions. Konami has strengthened its position through strategic product execution and regional contracts, supported by agreements and product performance. Light & Wonder has focused on hardware innovation, while niche providers remain relevant in areas such as cruise lines, dealerless tables, and connected floors. Smaller entrants face challenges due to the capital and time required for device approvals, maintenance, and enterprise integration. The market structure continues to favor established players with broad portfolios and global reach, as service depth and regulatory approvals require significant time to develop.

Casino Gaming Equipment Industry Leaders* Aristocrat Gaming

* Light & Wonder

* International Game Technology (IGT)

* Konami Gaming

* Everi

* *Disclaimer: Major Players sorted in no particular order

Component Component 3 Scope Of The Report Bottom

Global Casino Gaming Equipment Market Report ScopeBy Product TypeGaming Machines
| Slot Machines |
| Video Poker Machines |
| Class II / Electronic Bingo Machines |
Electronic Table Games | Electronic Roulette |
| Electronic Baccarat |
| Electronic Sic Bo / Multi-game Terminals |
Live Table Gaming Equipment | Roulette Wheels |
| Shufflers and Deck Checkers |
| Tables, Layouts, and Accessories |

| Chips, Plaques, and Jetons |
Casino Management Systems | Player Tracking and Loyalty Systems |
| Slot and Table Management Systems |
Cash Handling and TITO Systems (Bill Validators,Ticket Printers, and Readers |

Segmentation Accordion Item

By GeographyNorth America | United States |
| Canada |
| Mexico |
South America | Brazil |
| Peru |
| Chile |
| Argentina |
| Rest of South America |
Europe | United Kingdom |
| Germany |
| France |
| Spain |
| Italy |
| BENELUX (Belgium, Netherlands, and Luxembourg) |
| NORDICS (Denmark, Finland, Iceland, Norway, and Sweden) |
| Rest of Europe |
Asia-Pacific | India |
| China |
| Japan |
| Australia |
| South Korea |
| South East Asia (Singapore, Malaysia, Thailand, Indonesia, Vietnam, and Philippines) |
| Rest of Asia-Pacific |
Middle East And Africa | United Arab Emirates |
| Saudi Arabia |
| South Africa |
| Nigeria |
| Rest of Middle East And Africa |

Frequently Asked Questions

What is the size outlook for casino gaming equipment through 2031?

The Global Casino Gaming Equipment Market size stood at USD 11.82 billion in 2025, reached USD 12.54 billion in 2026, and is forecast to reach USD 16.93 billion by 2031 at a 6.2% CAGR.

Which product group is growing the fastest in this space?

Casino management systems are the fastest-growing product segment, with forecast growth of 7.35% CAGR through 2031, as operators invest more in analytics, payments, AML tools, and player tracking.

Why do integrated resorts matter so much for equipment demand?

Integrated resorts create large multi-year procurement cycles because each property may require USD 200 million to USD 400 million in gaming machines, ETGs, table infrastructure, and CMS deployment.

Which region leads current revenue and which one is growing the fastest?

North America led with 34.76% of revenue in 2025, while Asia-Pacific is forecast to grow the fastest at 6.68% CAGR through 2031.

How concentrated is supplier competition?

Supplier concentration is high because Aristocrat Gaming, Light & Wonder, IGT, Konami Gaming, and Everi together held 91.20% share in 2025.

What end-user group is expanding the fastest?

Cruise ships are the fastest-growing end-user segment with a projected 7.64% CAGR through 2031, supported by new ship orders and higher onboard gaming investment.