



Unified AI platform for instant iGaming analytics

Casual games performance in Europe

2025 vs 2026



June 2026

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Key takeaways

1 Aviator sets the visibility benchmark where crash has taken hold.

In markets where crash games have gained operator traction — notably Italy and Germany — Aviator consistently leads the segment by a wide margin, demonstrating that a single strong title can define the category ceiling in a given market.

2 Casual games are still a niche in European lobbies.

Across all five markets, crash and related genres rarely exceed 2–3% of casino lobby share, indicating significant untapped shelf space for operators willing to expand their casual offering.

3 Tier-1 markets are fragmented, with no dominant provider.

The Top 10 casual titles in each country span seven to nine different providers, meaning the segment is wide open — early movers with strong content pipelines have a real opportunity to consolidate.

4 Local dynamics shape the casual mix.

Football titles are surging in the Netherlands ahead of the 2026 World Cup, Plinko is carving out a distinct niche in Germany, and France shows dice games holding their ground alongside crash — one-size-fits-all strategies won't work across European markets.

5 Growth signals are there for those watching closely.

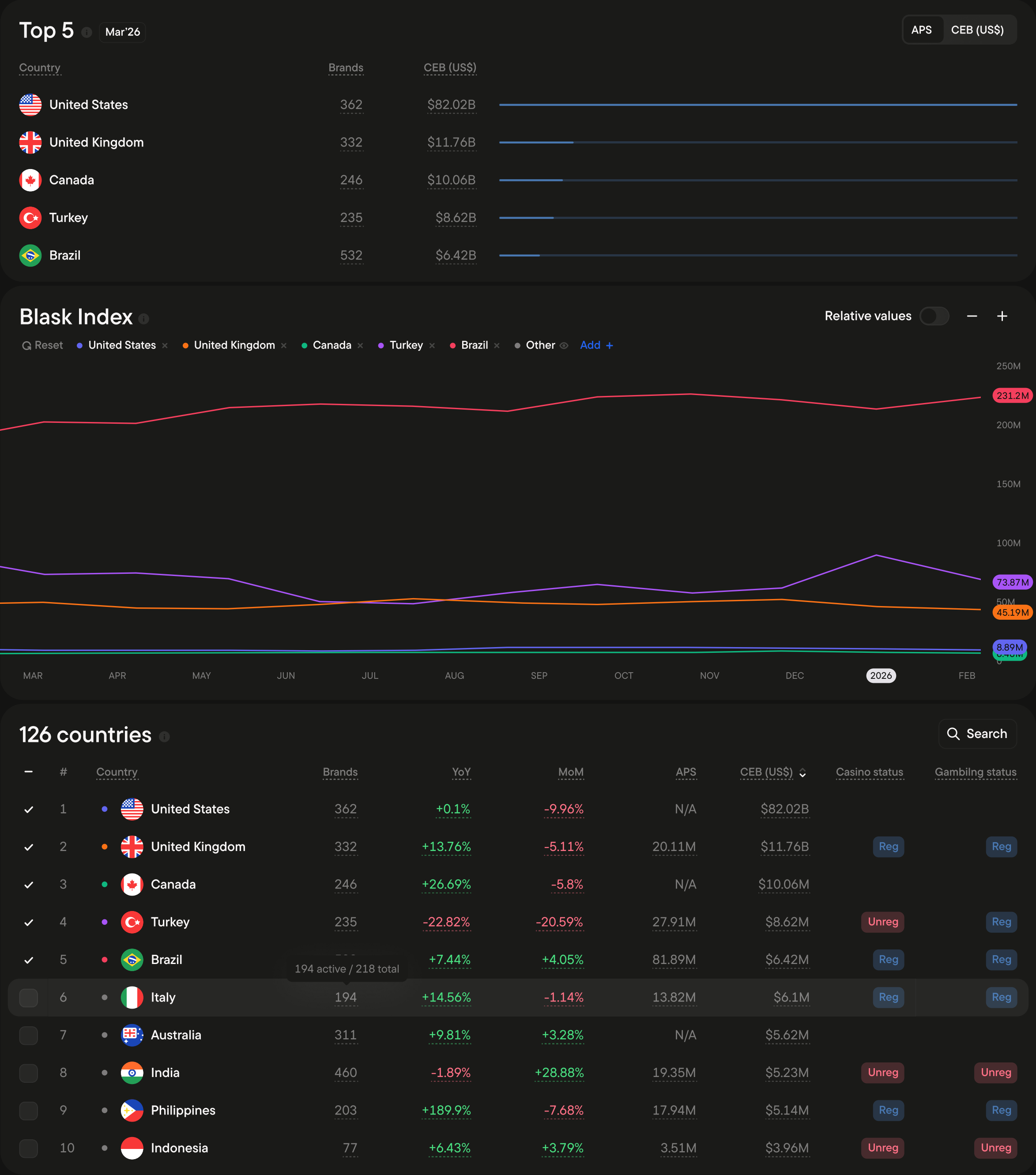
Crash nearly doubled its lobby share in France over the past year, and Aviator posted +20% MoM in Germany — the category is moving, just not uniformly. Markets with low current penetration and rising visibility are the ones to watch.

What is Blask?

Blask is an AI analytics platform for iGaming. It unifies broadly distributed and fragmented data from domestic and offshore operators in one place, delivering a single, reliable view of market dynamics and complete global- and country-level perspectives of market share trends.

Artificial Intelligence powers Blask’s proprietary technology. It detects key signals and converts them into clear, visual metrics, updated hourly, enabling deep analysis and precise trend tracking across the industry.

Blask makes the invisible visible. We replace legacy data sources with low-latency, high-frequency market data, reports and intelligence.



Since our public launch
in May 2024, Blask has:

150+

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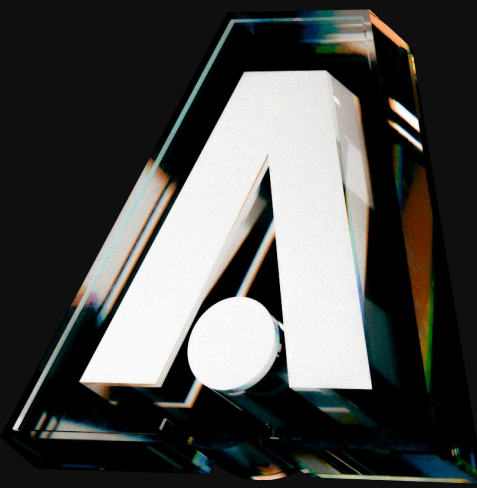
SIGMA Asia

Startup Pitch 2024



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Startup of the Year



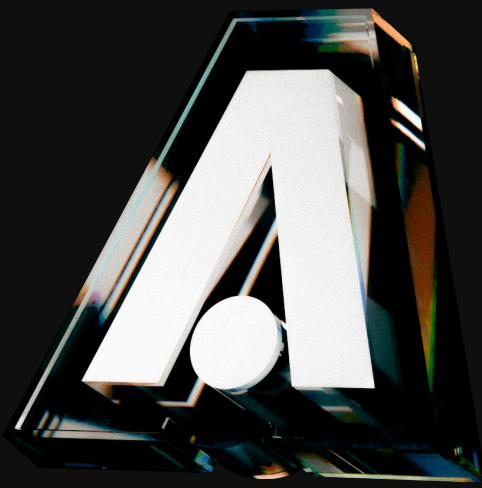
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BNL Data

Blask Games

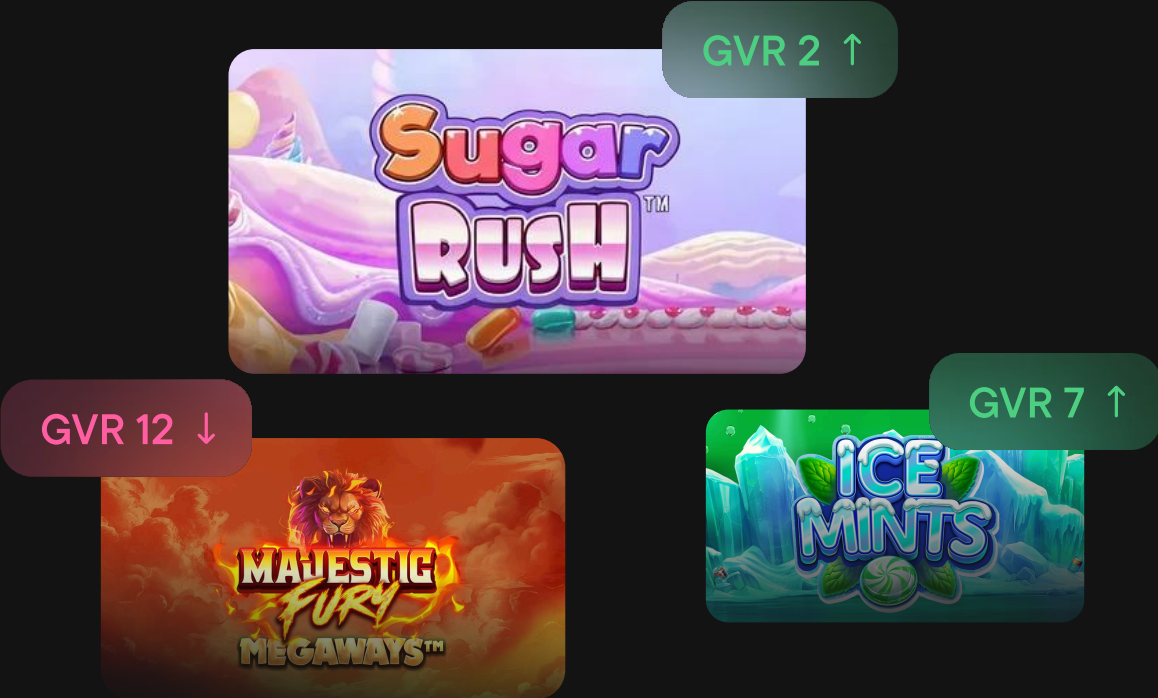
See both sides
of performance

- 1000+ sites tracked
- 40000+ games monitored
- Daily game positions update
- Monthly player interest update



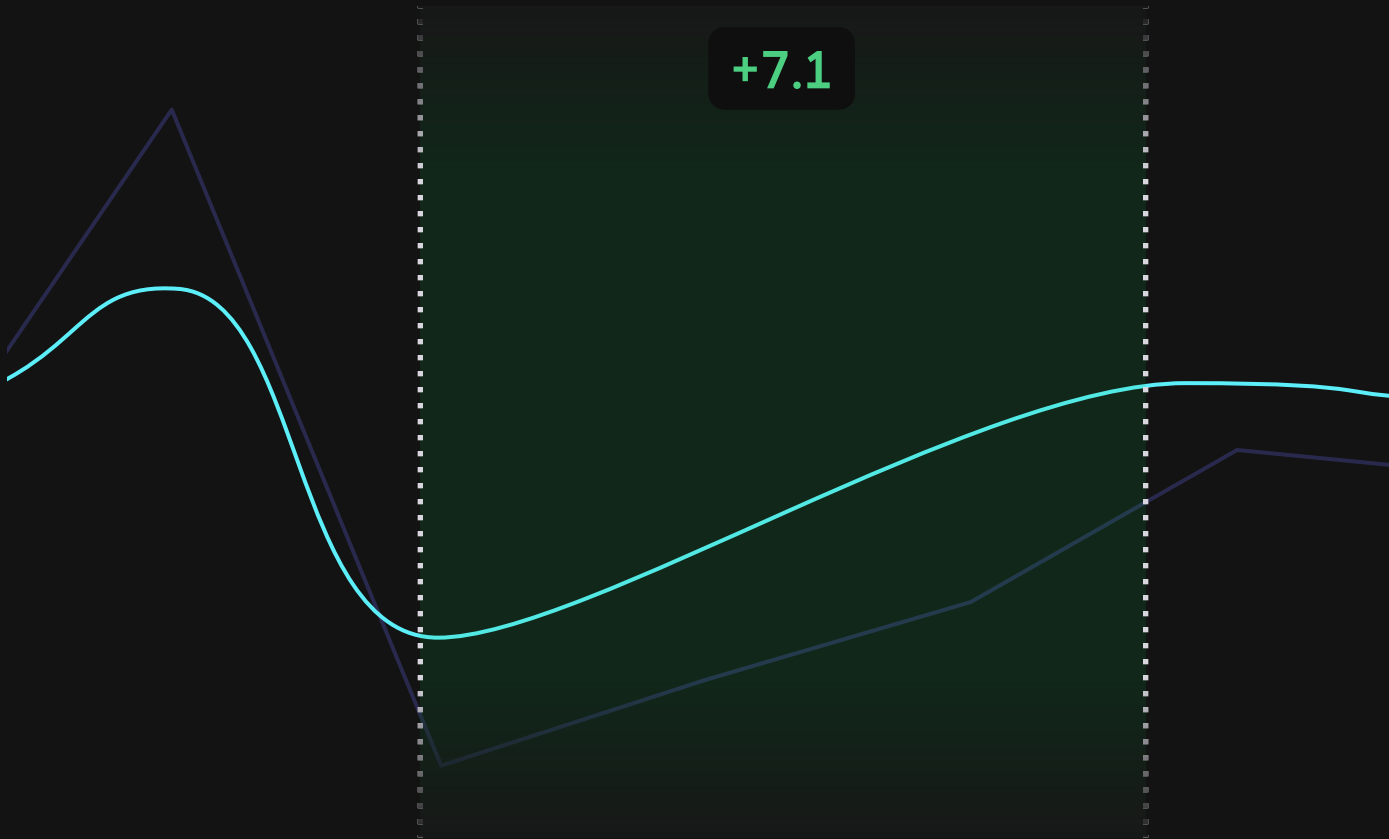
Market-ready picks

Spot rising titles early with demand + exposure trends



Placement optimization

Find gaps by operator/country and fix lobby order



Confident investment

Focus production, UA, and partnerships where upside is real

Looking at all five Tier 1 markets as a whole, the main conclusion is relatively straightforward: casual mechanics have already proven their viability in Europe, but they have yet to secure a significant share of casino lobbies.

Today, most operators continue to allocate the majority of their lobby space to slots, while crash, dice, mines, and other casual mechanics often account for just 1–3% of the overall offering. At the same time, the data shows that demand for certain games and categories is growing faster than their actual presence in casino lobbies.

We can also see that a one-size-fits-all strategy does not work across Europe. Germany shows strong interest in Plinko and crash mechanics, the Netherlands in football-themed and mines games, France is seeing growth in the crash and dice segments, while Italy remains a highly concentrated market dominated by a small number of leading titles.

Another important factor is the high level of fragmentation. Unlike the slots segment, where major providers have long-established positions, the casual gaming market does not yet have a dominant player. This creates a clear window of opportunity for studios willing to invest consistently in the category and regularly introduce new mechanics.

In our view, the next few years will bring a gradual shift in operator attention towards casual content. The reason is simple: new generations of players are coming from mobile gaming, TikTok, Shorts, and other fast-consumption content formats. They find it easier to engage with mechanics that can be understood within seconds and do not require a lengthy learning process.

The key question for the market is therefore no longer whether casual games will grow, but who will be able to capture this niche ahead of the competition and turn individual successful titles into a fully established category within the casino product.



Asker Hubiev

CEO 100HP

Top casual games across 26 markets

Aviator by Spribe leads the ranking by a wide margin, present across all 26 tracked markets and represented by 762 brands — nearly 70% more than the closest competitor.

The Top 20 is dominated by Tier-3 markets, with Brazil, India, and Nigeria appearing as leading countries in almost every title. Denmark stands out as the only Tier-1 market with consistent presence across the chart.

Pragmatic Play and SmartSoft lead among providers, each placing three titles in the Top 20. Notably, 100HP Gaming also secures a spot with Mines, reaching 26 countries.

Top 20 casual games by brand appearance

June 2026

#	Brand	Provider	Genre	Leading in	Brands	Countries
1	 Aviator	Spribe	Crash	Brazil, India, Nigeria	762	26
2	 Spaceman	Pragmatic Play	Crash	Brazil, Nigeria, Ecuador	448	26
3	 Big Bass Crash	Pragmatic Play	Crash	Brazil, United Kingdom, Ireland	431	26
4	 JetX	SmartSoft Gaming	Crash	Brazil, India, Nigeria	415	26
5	 Penalty Shoot-out	Evoplay	Crash	Brazil, India, Nigeria	347	26
6	 High Flyer	Pragmatic Play	Crash	Brazil, Nigeria, Ireland	346	25
7	 Balloon	SmartSoft Gaming	Crash	Brazil, India, Denmark	325	26
8	 Chicken Road 2.0	InOut Games	Crash	India, Denmark, Brazil	320	26
9	 Chicken Road	InOut Games	Crash	India, Brazil, Denmark	317	26
10	 Aviatrix	Aviatrix	Crash	Brazil, India, Ecuador	315	26
11	 Aviamasters	BGaming	Crash	Brazil, Denmark, India	314	26
12	 Football X	SmartSoft Gaming	Instant Win	Brazil, India, Denmark	310	26
13	 Mines	Spribe	Mine Games	Brazil, India, Nigeria	303	26
14	 Penalty Champion	Gaming Corps	Mine Games	Brazil, Germany, India	289	26
15	 Penalty Shoot-Out: Street	Evoplay	Instant Win	Brazil, India, Denmark	287	26
16	 Mines	100HP Gaming	Mine Games	Brazil, India, Denmark	259	26
17	 Dice	Spribe	Dice	Nigeria, India, Brazil	230	26
18	 Boxes	Hacksaw Gaming	Instant Win	United Kingdom, Brazil, Nigeria	229	25
19	 Space XY	BGaming	Crash	Brazil, India, Denmark	226	26
20	 Piggy Tap	Onlyplay	Instant Win	India, Brazil, Denmark	203	25

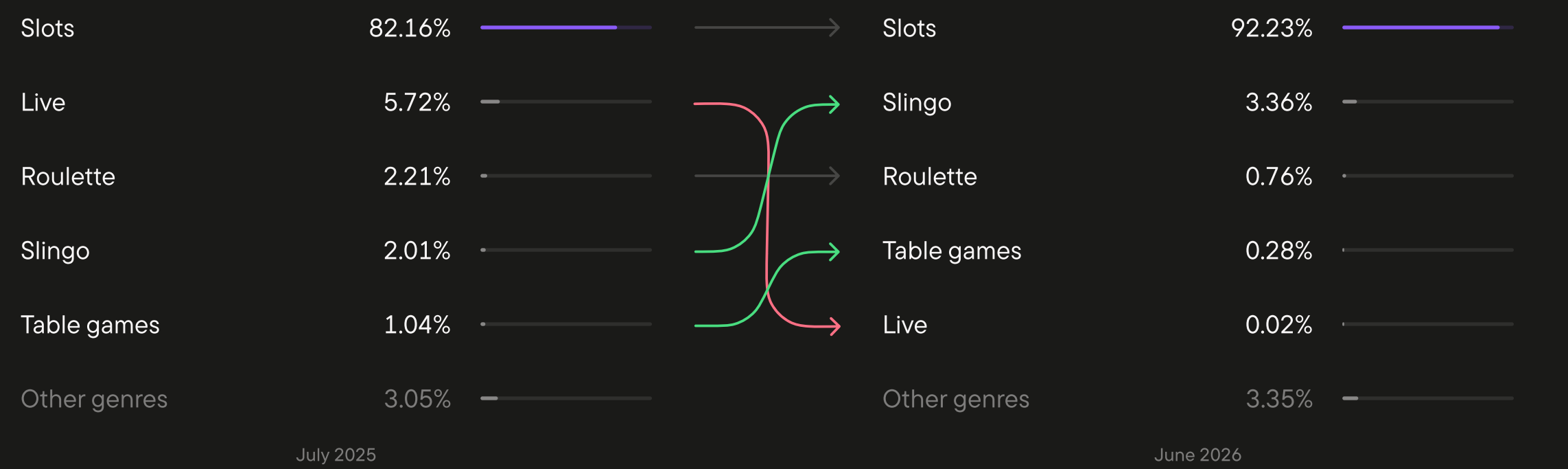
United Kingdom

Casual games hold a modest 2% share of casino lobbies across UK brands — yet competition within the segment is intense. Four titles exceed 10% visibility, led by Big Bass Crash (Pragmatic Play), a crash variation of one of the industry's most recognizable slot franchises.

The Top 10 casual titles represent seven different providers, signaling a fragmented market with no single supplier dominating shelf space.

United Kingdom genre content share in lobbies

Jul 2025 – Jun 2026



United Kingdom casual games visibility

June 2026

Average GVR

Jun 8, 2026

#	Games	Provider	Genre	Avg GVR ↕
1	 Football Glory Fortune Pick	NetGaming	Instant Win	10.2
2	 Bucking Rider	Play'n GO	Crash	12
3	 Tiki Quest	PopOK Gaming	Instant Win	12
4	 Miner Donkey Rider	Play'n GO	Crash	13
5	 Penalty Shootout	InsaGames	Instant Win	15
6	 Plinko Rush	Betsoft	Plinko	17
7	 Christmas Crash	Evoplay	Crash	18
8	 Football Freestyler	Gaming Corps	Crash	18
9	 Luck of the Dead	Greentube	Instant Win	18
10	 Avi	PopOK Gaming	Crash	19

Games visibility

Jun 8, 2026

#	Games	Provider	Genre	Visibility ↕	WoW	MoM
1	 Big Bass Crash	Pragmatic Play	Crash	19.17%	+0.58%	-2.38%
2	 Boxes	Hacksaw Gaming	Instant Win	12.14%	-0.16%	-0.89%
3	 FlyX	Buck Stakes Entertainment	Crash	11.02%	-1.39%	+1.63%
4	 The Spaghetti Bandits Megaways	Bet365 Software	Crash	10.27%	+1.79%	-0.53%
5	 Cursed Castle	Evoplay	Instant Win	8.81%	+1.17%	-4%
6	 Luck O' The Irish Scratchcard	Blueprint Gaming	Instant Win	8.69%	-0.36%	-1.18%
7	 Coins	Hacksaw Gaming	Instant Win	7.92%	-0.14%	-0.22%
8	 Wild Scoops - Tap n Cash	Coin Machine Gaming	Instant Win	7.14%	-0.01%	-0.26%
9	 Free Kick Shooter	Bet365 Software	Instant Win	7%	-0.21%	+7%
10	 Whack the Bell - Tap n Cash	Coin Machine Gaming	Instant Win	7%	-0.02%	+0.12%

Italy



Italy casual games visibility

June 2026

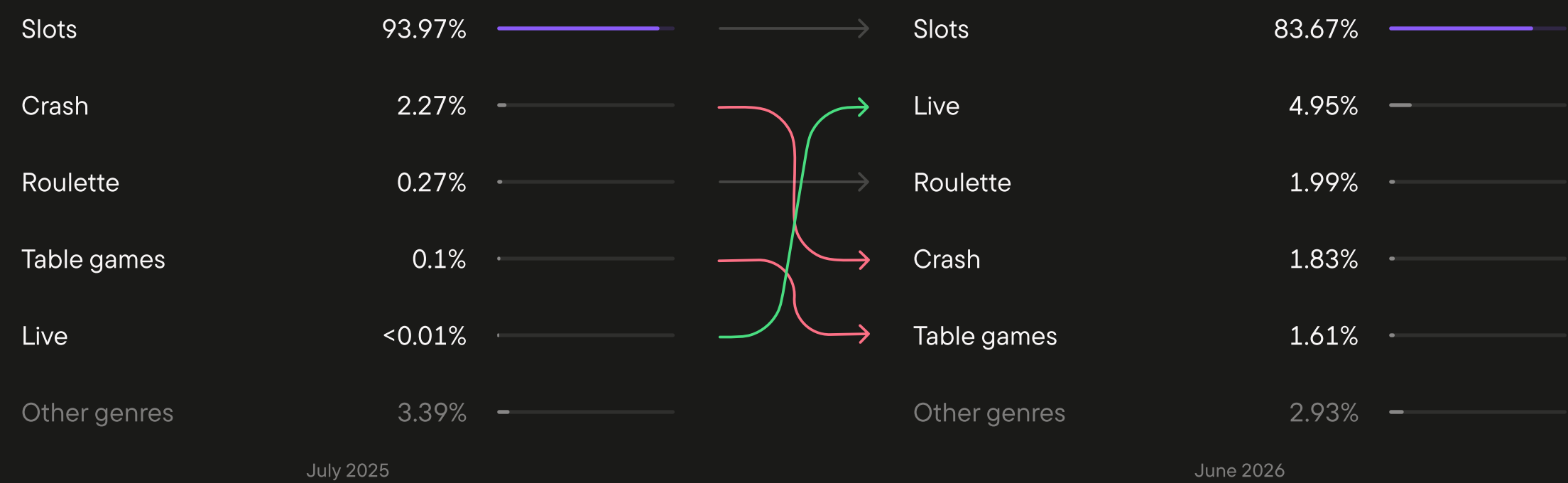
Crash games hold a 1.83% share of Italian casino lobbies — comparable to the UK level and showing no meaningful growth over the past year.

Within that limited shelf space, Aviator dominates with 60.19% visibility, making it the second most visible game in the entire Italian market across all genres.

The Top 10 casual titles span nine different providers, reflecting yet another fragmented competitive landscape.

Italy genre content share in lobbies

Jul 2025 – Jun 2026



Average GVR

Jun 8, 2026

#	Games	Provider	Genre	Avg GVR ↕
1	YOriginal Dice	YOriginal	Instant Win	20
2	Mines	Coin Machine Gaming	Mine Games	24.5
3	Penalty Shoot-Out: Street	Evoplay	Instant Win	26
4	To Mars and Beyond	Gaming Corps	Crash	27
5	MRIYA	NetGame	Crash	30
6	Penalty From The Streets	Solidicon	Instant Win	31.3
7	Diver	InOut Games	Crash	34
8	7 & Crystals Dice	Amusnet	Dice	35
9	Plinko	Stake Originals	Plinko	35
10	Aviator	Spribe	Crash	35.2

Games visibility

Jun 8, 2026

#	Games	Provider	Genre	Visibility ↕	WoW	MoM
1	Aviator	Spribe	Crash	60.19%	+0.79%	+0.82%
2	High Flyer	Pragmatic Play	Crash	27.36%	-1.79%	+1.17%
3	JetX	SmartSoft Gaming	Crash	26.95%	+1.75%	+5.7%
4	Spaceman	Pragmatic Play	Crash	23.12%	+1.54%	-0.42%
5	Cash it	Playtech	Crash	21.09%	-1.27%	-0.53%
6	Table Soccer Crush&Win	Giocaonline	Instant Win	17.6%	+0.06%	-6.85%
7	Big Fish Bonanza	ESA Gaming	Crash	16.72%	+1.37%	-4.68%
8	FlyX	Buck Stakes Entertainment	Crash	16.08%	+1.48%	+0.66%
9	Plinko	Ricochet	Plinko	15.06%	-0.55%	+5.41%
10	Mine Crash	Darwin Gaming	Crash	15%	-0.32%	-0.51%

Netherlands



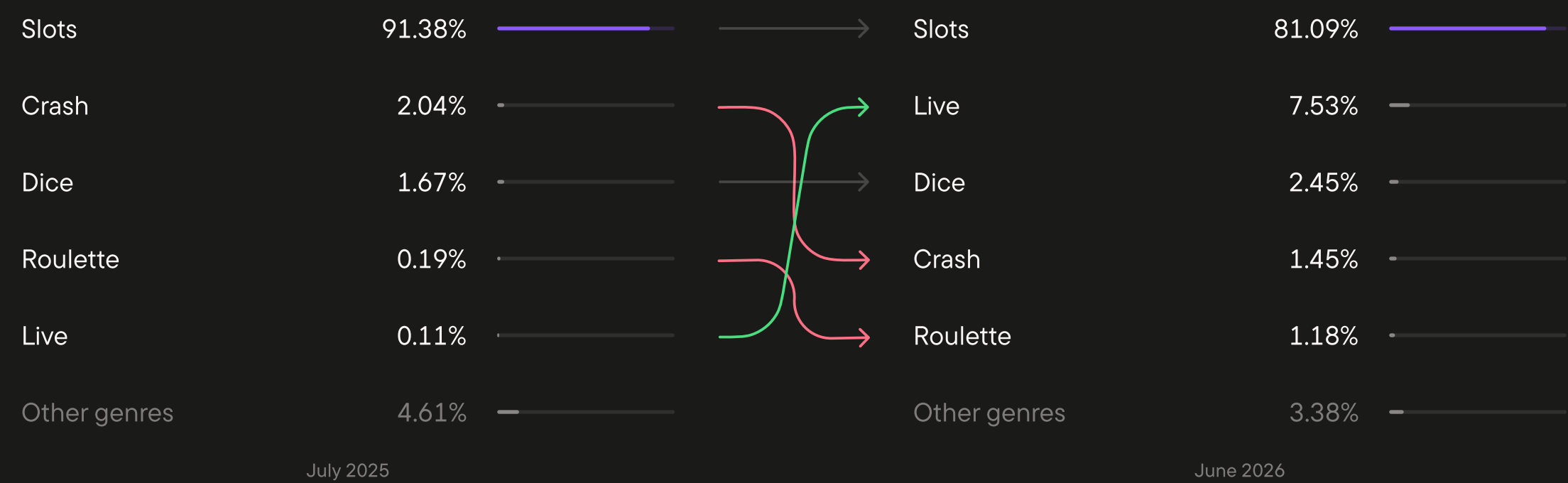
Casual games occupy a relatively modest share of Dutch lobbies, with crash at 1.45% and dice at 2.45% — notably, crash has actually declined over the past year, from 2.04% to its current level.

The Top 3 is led by two football-themed titles — Soccer Striker 2 and Penalty Champion — a trend likely connected to the 2026 FIFA World Cup buzz building across European markets.

Mine games are particularly well-represented, claiming three of the Top 10 spots, while Buck Stakes Entertainment stands out as the most concentrated provider presence with three titles in the ranking.

Netherlands genre content share in lobbies

Jul 2025 – Jun 2026



Netherlands casual games visibility

June 2026

Average GVR

Jun 8, 2026

#	Games	Provider	Genre	Avg GVR ↕
1	GoalX	Onlyplay	Crash	10
2	Cyber Spinner	Air Dice	Dice	11
3	Mystery Box (Gaming1)	Gaming1	Dice	11
4	Crack The Safe Gridders Jackpot Dice	Gaming1	Dice	12
5	Wild Hot 40 Blow Dice	FAZI	Dice	12
6	27 Dice	Amusnet	Dice	13
7	Red Card	G.Games	Instant Win	14
8	Coco Craze	Air Dice	Dice	16
9	Tennis Scratch	G.Games	Instant Win	16
10	Gates of Olympus Dice	Pragmatic Play	Dice	16.2

Games visibility

Jun 8, 2026

#	Games	Provider	Genre	Visibility ↕	WoW	MoM
1	Soccer Striker 2	Games Global	Instant Win	19.18%	+0.25%	-7.41%
2	FlyX	Buck Stakes Entertainment	Crash	17.27%	+1.07%	-0.58%
3	Penalty Champion	Gaming Corps	Mine Games	14.86%	+3.41%	-1.13%
4	Aviator	Spribe	Crash	14.04%	+0.29%	-2.05%
5	King Kong Crash Climber	Inspired Gaming	Crash	13.76%	-1.19%	-2.91%
6	Thunderstruck FlyX	Buck Stakes Entertainment	Crash	12.97%	+1.23%	-1.04%
7	Mines	Coin Machine Gaming	Mine Games	12.68%	+0.49%	-1.19%
8	Mines+	Pragmatic Play	Mine Games	12.15%	-0.34%	-1.96%
9	Balls Galore Lightning Drop	Coin Machine Gaming	Plinko	11.38%	-<0.01%	-0.98%
10	FlyX Cash Turbo	Buck Stakes Entertainment	Crash	11.02%	-0.18%	-1.83%

France



France casual games visibility

June 2026

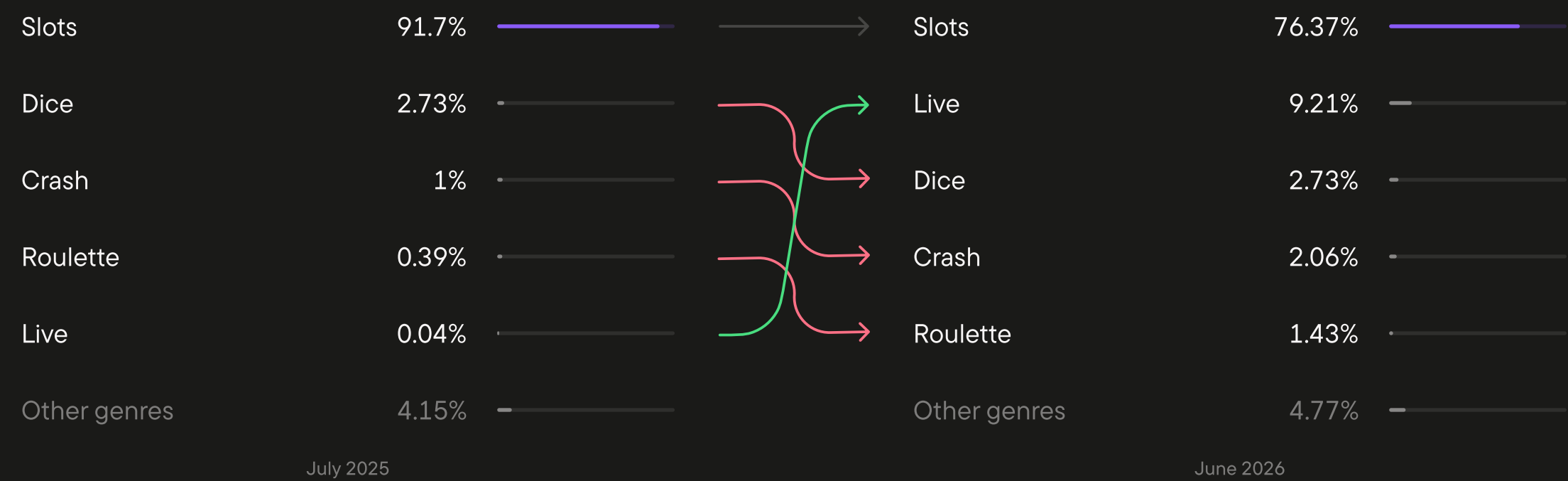
Both crash and dice games have grown their share of French casino lobbies over the past year — crash nearly doubled, while dice held steady.

Visibility scores remain low across the board, with the top title Chicken Road 2.0 reaching just 4.51%, suggesting casual games are still a secondary priority for French operators.

InOut Games is the standout provider, placing two titles in the Top 10 with Chicken Road 2.0 and Penalty Unlimited.

France genre content share in lobbies

Jul 2025 – Jun 2026



Average GVR

Jun 8, 2026

#	Games	Provider	Genre	Avg GVR ↕
1	Mines	Live22	Mine Games	10
2	Mystery Box (Gaming1)	Gaming1	Dice	11
3	Crack The Safe Gridders Jackpot Dice	Gaming1	Dice	12
4	Space XY	BGaming	Crash	12
5	Giga Spinner	Mr.Sloth	Dice	14
6	Sugar Rush Dice	Pragmatic Play	Dice	14
7	Trader	Spribe	Crash	14
8	Lucky Wheel	Mr.Sloth	Dice	15
9	20 Golden Dice	Amusnet	Dice	15.5
10	Big Bass Dice	Pragmatic Play	Dice	15.5

Games visibility

Jun 10, 2026

#	Games	Provider	Genre	Visibility ↕	WoW	MoM
1	Chicken Road 2.0	InOut Games	Crash	4.51%	-0.21%	-1.83%
2	Aviator	Spribe	Crash	4.22%	+0.21%	-0.73%
3	Aviatrix	Aviatrix	Crash	3.99%	-0.02%	-1.93%
4	Tower Rush	Galaxsys	Crash	3.57%	-0.07%	-1.6%
5	Vortex	Turbo Games	Crash	3.31%	0%	-1.74%
6	Penalty Shoot-Out: Street	Evoplay	Instant Win	3.27%	+3.24%	+2.74%
7	Aviamasters	BGaming	Crash	2.8%	-0.13%	-0.29%
8	Penalty Unlimited	InOut Games	Instant Win	2.78%	-1.52%	-3.2%
9	Lucky's Pot of Charms	Air Dice	Dice	2.5%	+2.45%	+2.5%
10	Aviamasters X-mas	BGaming	Crash	2.03%	0%	-1%

Germany



Germany casual games visibility

June 2026

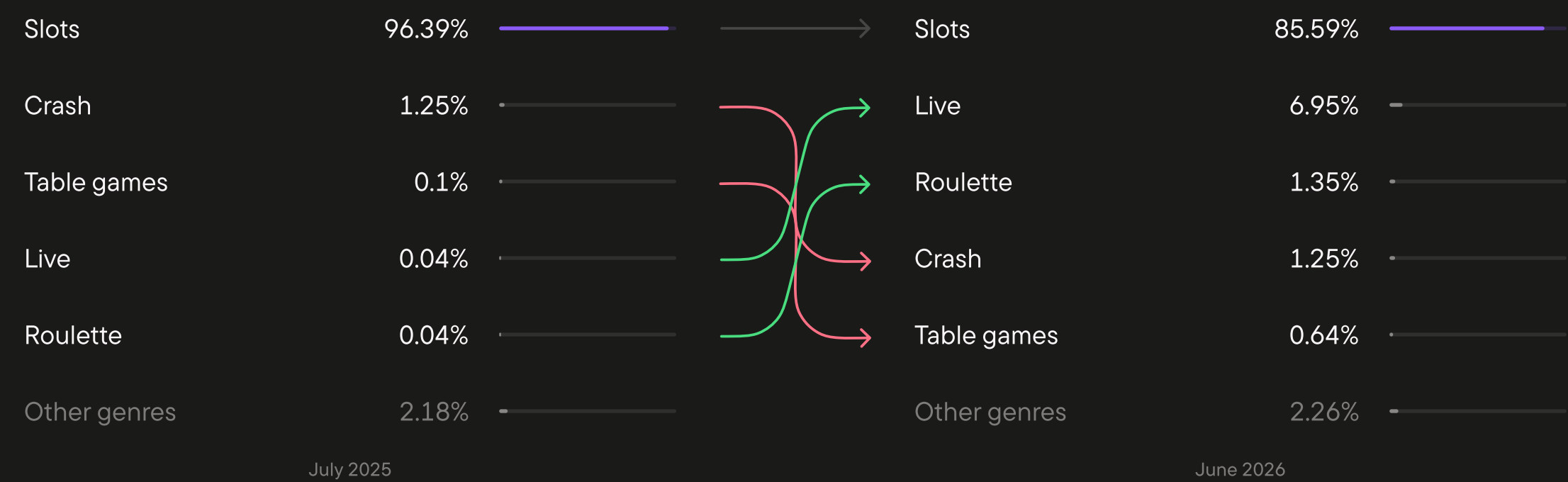
Crash games hold a stable 1.25% share of German casino lobbies, unchanged over the past year, pointing to a market that has found its casual equilibrium without significant growth momentum.

Aviator leads the segment by a wide margin — more than double the second-placed title — and has seen a sharp month-on-month surge.

Plinko is emerging as a notable sub-genre in Germany, with two titles in the Top 5: Plinko Rush and Olympus Plinko by Betsoft.

Germany genre content share in lobbies

Jul 2025 – Jun 2026



Average GVR

Jun 8, 2026

#	Games	Provider	Genre	Avg GVR ↕
1	Crash Bonus	TaDa Gaming	Crash	10.5
2	GoalX	Onlyplay	Crash	11
3	Penalty Shoot-Out: Super Cup	Evoplay	Instant Win	12
4	Mines	Roobet Games	Mine Games	12.5
5	Plinko	Stake Originals	Plinko	13.3
6	Mines	Stake Originals	Mine Games	14.3
7	Dice	Roobet Games	Dice	15
8	Tennis Scratch	G.Games	Instant Win	15.2
9	Mines	Coin Machine Gaming	Mine Games	16
10	Crash	Blitzcrown	Crash	17

Games visibility

Jun 8, 2026

#	Games	Provider	Genre	Visibility ↕	WoW	MoM
1	Aviator	Spribe	Crash	31.65%	-1.13%	+20.88%
2	Plinko Rush	Betsoft	Plinko	15.29%	-0.12%	+6.18%
3	Aviatrix	Aviatrix	Crash	14.73%	-2.83%	+3.74%
4	Penalty Shoot-out	Evoplay	Crash	12.45%	-0.8%	+3.32%
5	Olympus Plinko	Betsoft	Plinko	11.85%	+0.56%	+3.47%
6	Spaceman	Pragmatic Play	Crash	11.67%	+0.06%	+3.99%
7	Wheel of Luck	SpinOro	Instant Win	11.52%	+10.99%	+10.77%
8	Heads & Tails	Evoplay	Instant Win	11.38%	-0.14%	+5.7%
9	JetX	SmartSoft Gaming	Crash	11.17%	+0.18%	+4.13%
10	Pilot	Gamzix	Crash	10.98%	+0.05%	+4.39%

Spain



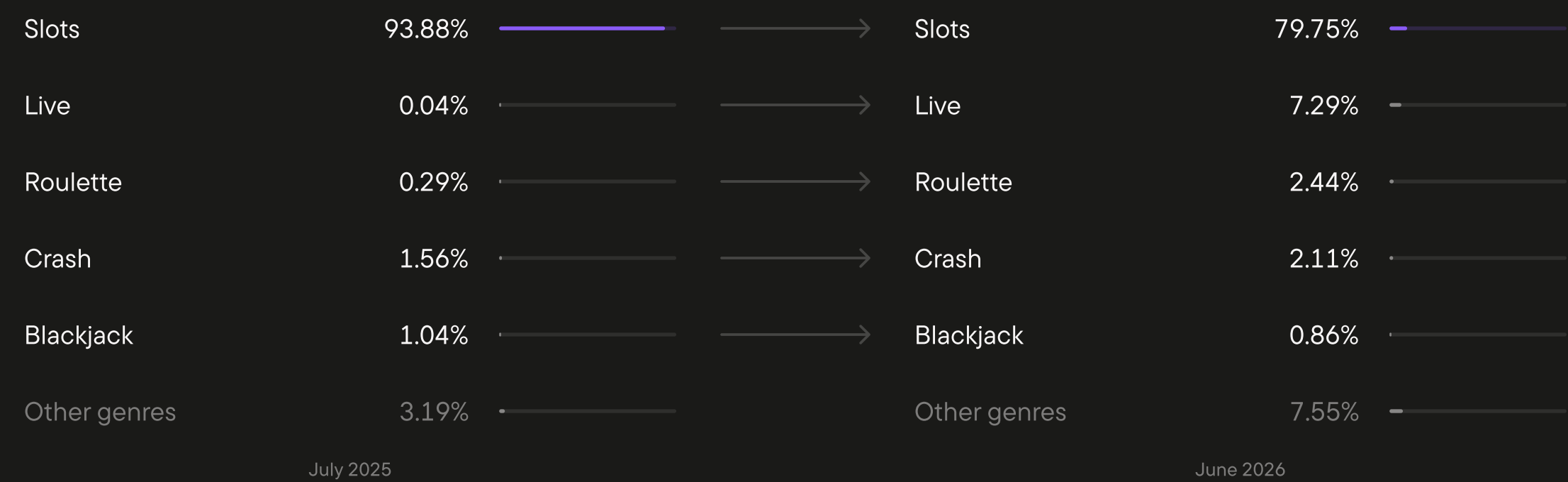
Crash has edged up its share of Spanish casino lobbies over the past year — a modest but notable shift toward genre diversification in a market otherwise built around slots.

On the GVR leaderboard, Astronaut stands out as a top performer for 100HP Gaming.

Pragmatic Play dominates visibility, placing four titles in the top 10, while Buck Stakes Entertainment quietly secures two spots with FlyX and Thunderstruck FlyX.

Spain genre content share in lobbies

Jul 2025 – Jun 2026



Germany casual games visibility

June 2026

Average GVR

Jun 8, 2026

#	Games	Provider	Genre	Avg GVR ↕
1	Scratch King	SpinOro	Instant Win	11
2	Mine Field	Evoplay	Crash	14
3	Ronaldinho Scores Shoot & Win	Booming Games	Instant Win	18
4	Aviamasters 2	BGaming	Crash	20
5	Balloon	SmartSoft Gaming	Crash	20
6	Hot Racing	Amusnet	Crash	21
7	Plinko Clusters	Games Global	Instant Win	21
8	Astronaut	100HP Gaming	Crash	22
9	Doodle Crash	Barbara Bang	Crash	22
10	To Mars and Beyond	Gaming Corps	Crash	23

Games visibility

Jun 8, 2026

#	Games	Provider	Genre	Visibility ↕	WoW	MoM
1	High Flyer	Pragmatic Play	Crash	33.63%	-1.41%	-0.98%
2	Aviator	Spribe	Crash	30.01%	-1.32%	+1.29%
3	Spaceman	Pragmatic Play	Crash	25.21%	+2.85%	+1.53%
4	Limbo+	Pragmatic Play	Other	21.69%	-7.12%	+9.38%
5	FlyX	Buck Stakes Entertainment	Crash	21.69%	+0.01%	+1.32%
6	Big Bass Crash	Pragmatic Play	Crash	20.92%	+1.62%	-3.14%
7	Soccer Striker 2	Games Global	Instant Win	19.4%	-7.65%	+9.86%
8	Cash Plane X5000	Playtech	Crash	16.09%	+1.89%	-2.89%
9	Thunderstruck FlyX	Buck Stakes Entertainment	Crash	15.84%	+0.4%	+0.49%
10	4 Cash Planes: Multiplayer	Playtech Origins	Other	15.33%	-2.28%	-3.74%

In my view, casual games in Europe have already proven their viability — their growth right now is limited not by a lack of player interest, but by insufficient lobby space and operator attention. The share of casual mechanics often sits at just 1–3%, while demand for individual categories is growing faster than their actual presence.

There's no one-size-fits-all strategy for Europe: Germany responds more strongly to Plinko and crash, the Netherlands to mines and football-themed mechanics, while Spain shows the potential of standout individual products — Astronaut has already broken into the Top 10 by Average GVR.

For 100HP, the next stage isn't simply adding more integrations — it's turning distribution into stable lobby visibility, repeat demand, and strong positions in each specific market. The winner won't be a single lucky hit, but the provider that can systematically grow the entire casual category.



Asker Hubiev

CEO 100HP

 **Blask**

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