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Top 50

MOBILE

Game Makers

2020

in association with



Microsoft



G-STAR

The mobile
movers
& shakers
of the last
12 months

From breaking industry stories and in-depth interviews with key executives to updates on industry events and detailed analysis of mobile games metrics, *PocketGamer.biz* is the first port of call for mobile game developers, publishers, operators, handset manufacturers, investors, and service providers.

www.pocketgamer.biz

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www.pocketgamer.biz

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Welcome...

Our Top 50 Mobile Game Makers list is now in its 11th year, and what a year it's been already.

2020 will be remembered for a lot of things, but in the mobile games industry it will likely be remembered for the continued growth of hypercasual as a genre, some impressively large acquisitions, and a string of battles waged across and about the app stores.

We've seen Apple Arcade offer a new avenue for premium mobile developers, while free-to-play revenues have surged thanks to people spending more time at home. And we've seen streaming services start kicking into high gear, with Stadia and xCloud battling it out on smaller screens with console titles.

It's been tough picking out the developers we consider to be "the best" amongst all the chaos of 2020. It's been a difficult year, and it isn't getting any easier. Realistically, every company still hanging on deserves recognition of some kind.

Still, we want to take the time to celebrate the best game makers in the industry, and so once again consider our Top 50. There's a lot to take into account - revenues, quality of games - but perhaps the most important metric for this year's edition is potential.

We want to commemorate the developers making the big moves in the market, the ones who are investing heavily in their future and have exciting prospects on the horizon.

Maybe that's an upcoming game currently in soft launch, or perhaps it's an intriguing acquisition that set tongues wagging at the time. Whatever the case, bold actions and impressive growth has been the key to success in this year's Top 50.

Ric

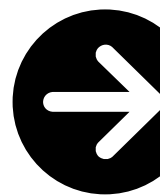
Ric Cowley
Editor - PocketGamer.biz

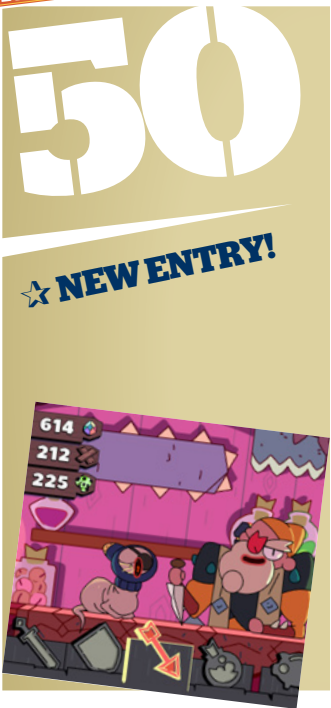
in association with
Microsoft G-STAR

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Your top 50
countdown
begins here...





Capybara Games



Softography

Grindstone

www.capybaragames.com

Capybara Games may have only released one notable mobile game in the last 12 months, but it's fair to say that the arrival of *Grindstone* has made a significant impact across the industry.

A launch title for Apple's Arcade service, *Grindstone* quickly became the defining game of the collection – an experience you can only get on mobile, perfectly suited for the platform, and with an assured long life ahead of it thanks to the addition of new levels and mechanics.

Capybara doesn't work much on mobile anymore, but with the success of *Grindstone*, that may change in the future.



Ndemic

Plague Inc. is a staple of the premium mobile market, but its importance has surged due to rather obvious reasons: a pandemic on the same scale as depicted in the game.

Now eight years old, the game's success enabled indie studio Ndemic to donate \$250,000 to coronavirus relief charities, and add an anti-virus mode slightly more befitting the current climate.

Ndemic isn't just a one-trick-pony, however, and its other title *Rebel Inc.* is also greatly benefitting from its predecessor's success, with a hefty single-player campaign due to be added in the future.

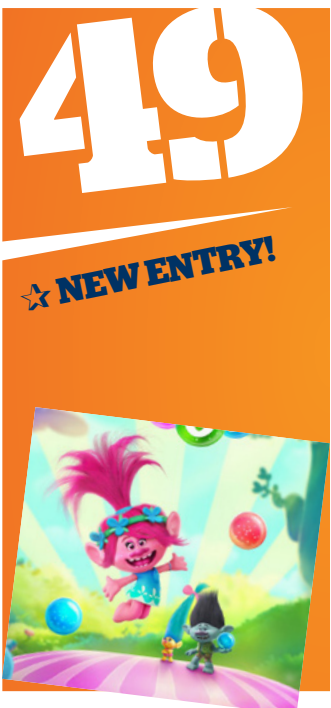
www.ndemiccreations.com



Softography

Plague Inc.

Rebel Inc.



Huuuge Games

Huuuge is perhaps best known as a social casino studio, but the last year has seen it make a few big pushes into the more traditional mobile games, too.

Not only did it pick up the Trolls licence for a casual bubble shooter, it also published *Matchland* and *Transport It Tycoon*, further diversifying its portfolio.

On top of all that, Huuuge acquired *Bow Land* developer Double Star and interactive ads firm Playable Platform as part of its "Build and Buy" strategy, which will no doubt see further M&A activity from the studio in the months to come.

huuugegames.com

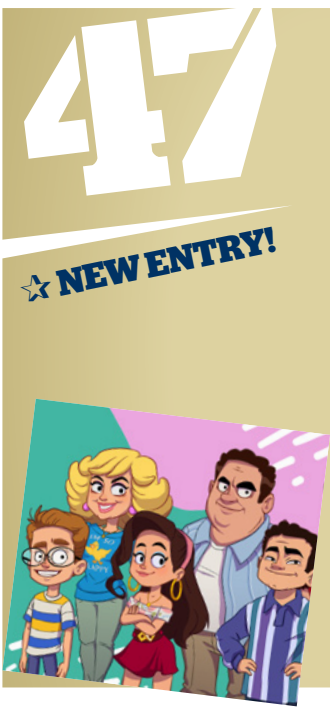


Softography

Bow Land

DreamWorks Trolls Pop

Matchland



East Side Games



Softography

It's Always Sunny: The Gang Goes Mobile

Trailer Park Boys: Greasy Money

The Goldbergs: Back to the 80s

www.eastsidegames.com

Carving out a niche in the crowded mobile market is a pretty smart move, and it certainly seems to be paying off for narrative-led idle game developer East Side Games.

It's clearly caught the eye of TV execs, with the studio launching a game based on *It's Always Sunny in Philadelphia* and securing *The Goldbergs* IP for another title.

East Side is also looking to grow the idle game market with its IdleKit SDK, which was used in *Dragon Up: Idle Adventure* from Night Garden Studio, and likely in more games to come.



www.annapurnainteractive.com

Annapurna Interactive



While a relative newcomer to the gaming scene, Annapurna Interactive has cemented itself as one of the most interesting and exciting mobile publishers around.

Simogo's *Sayonara Wild Hearts* is the jewel in its crown, but it's important not to discount the rest of Annapurna's catalogue, which in the last 12 months included *Telling Lies*, *If Found...*, and a mobile port of *Journey*.

While these titles may be multiplatform, Annapurna recognises mobile as a legitimate space for its less conventional games, and upcoming releases like *The Artful Escape* and *The Pathless* are sure to bring more intriguing premium experiences to the platform.

Softography

- Sayonara Wild Hearts
- Telling Lies
- If Found...



www.hutch.io

Hutch Games

London-based Hutch Games has proven itself to be a master of racing titles, both with its original IP and a particularly big licence now in its catalogue.

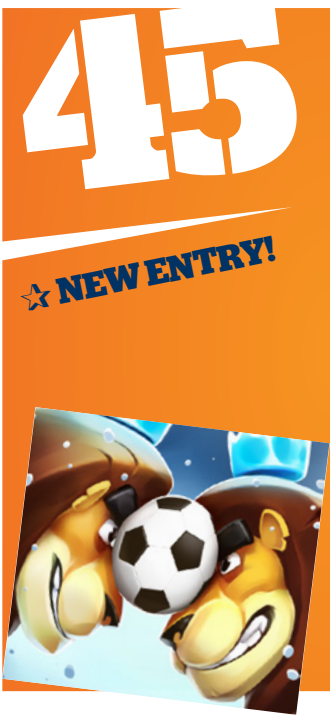
F1 Manager continues to race ahead, with a huge new update in 2020 to bring the game in line with the current race season, adding new series and car components for a convincing and exciting refresh.

And it's secured top brands for its original titles, such as card-collector *Top Drives* and arcade racer *Rebel Racing*. We look forward to seeing what other spins on the racing genre Hutch conjures up.



Softography

- F1 Manager
- Rebel Racing
- Top Drives



www.frogmind.com

Frogmind

Frogmind has clearly hit on a winning formula with its *Rumble* series - how else can you explain its launch of *Rumble Hockey* so soon after *Rumble Stars Soccer*?

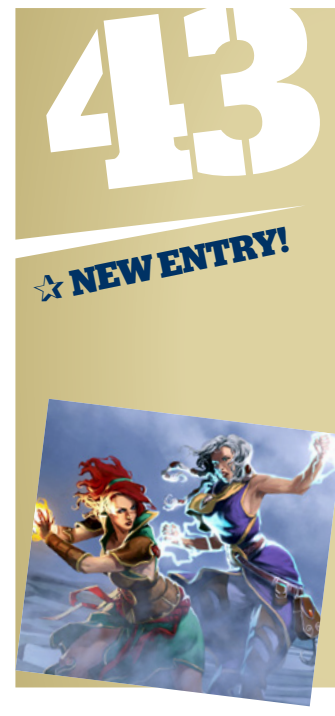
While both games follow a similar format, *Rumble Hockey* caught our eye with its influencer program, offering a 100% revenue share from IAPs purchased by players the influencers brought into the game.

It's an interesting proposal, and no doubt helped push the title to clear 1 million downloads in a month - something it is surely looking to replicate with its next release, presumably featuring the same influencer incentive.



Softography

- Rumble Hockey
- Rumble Stars Soccer



www.jagex.com

Jagex



Jagex could be accused of simply ticking along with *RuneScape* and *Old School RuneScape*, though its sale to Macarthur Fortune Holding for \$530 million is a sure sign of the faith people have in the studio.

Indeed, Jagex posted annual revenues of \$137.6 million for 2019, the first time in its history that it has cleared the \$100 million mark, thanks to an uptick in subscriptions across both its games on mobile and PC.

Not bad for a series which is fast approaching its 20th anniversary and is still finding its feet on the smaller screen.

But Jagex is also looking forward: the recently announced deal to bring Flying Wild Hog's next game to market signals its move into third-party publishing.

Softography

- RuneScape
- Old School RuneScape

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Kwalee



It's been a tough year for every developer, but Kwalee has taken the shift to remote working in its stride.

Not only has it launched two new hypercasual games developed while the UK was in lockdown, but it's also expanded into India with a new studio and partnered with Buildbox to potentially publish games made in the no-code development platform.

With Kwalee now opening more of its roles to remote workers on a permanent basis, the studio looks primed to grow its development capabilities and expand its catalogue of hypercasual titles no matter what the future holds.

Softography

Bake It

Line Up: Draw the Criminal

www.gunghoonline.com

GungHo Interactive

Think of GungHo on mobile and you'll probably think of one game in particular: the ever-popular *Puzzle & Dragons*.

Despite never quite breaking the western market, *P&D* has now cleared 54 million downloads in Japan eight years after first launching, and has recently added a subscription pass which is sure to appeal to existing spenders.

GungHo has other games, of course - mobile card-battle *Teppen* and Switch shooter *Ninjala* have seen strong starts - but there's no doubting *Puzzle & Dragons* will continue to be the company's top performer, even as it approaches its tenth birthday.



Softography

Puzzle & Dragons

Teppen

41



40

★ NEW ENTRY!



Capcom

Capcom may not have a huge mobile presence, but it's been making some interesting moves of late that have put it back on our radar.

Not only has it returned to the casual market with *Snoopy Puzzle Journey*, it also continues to pursue a core audience in Japan, with recently launched *Monster Hunter Riders* clearing 5 million downloads within two months of release.

But most exciting is China-only release *Devil May Cry: Pinnacle of Combat*, the first mobile game to use the *DmC* licence and, based on what has been shown so far, one with some serious potential.

www.capcom.com

CAPCOM®

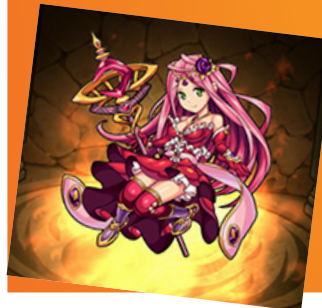
Softography

Monster Hunter Riders

Devil May Cry: Pinnacle of Combat

Snoopy Puzzle Journey

38



Mixi

mixi

Softography

Monster Strike

Monster Strike is another one of those games that never found an audience outside of Japan, but its home country fans are big, big spenders.

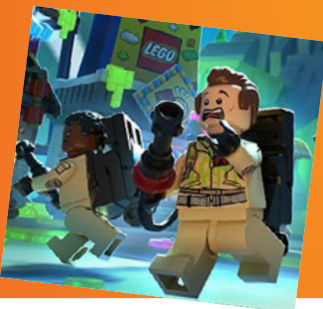
The almost seven-year-old game has seen MAUs fall pretty consistently year-on-year, but it continues to pull in huge revenues and remains the main focus of Mixi's mobile gaming business strategy.

That *Monster Strike* alone contributed the bulk of Mixi's \$1.06 billion annual revenue for 2019 is staggering – even if it is a yearly decline. But with everyone stuck in their homes for plenty of 2020, that figure is sure to again rise higher this year.

www.mixi.co.jp

39

★ NEW ENTRY!



Lego



Softography

Lego Builder's Journey

Lego Legacy: Heroes Unboxed

www.lego.com

Recent months have seen Lego fully embrace the world of gaming – and not just because of its partnership with Nintendo on the impressive new Super Mario sets.

Instead, it's the launch of Light Brick Studios, a development team working on experimental mobile games, which has drawn attention in the mobile space thanks to its beautiful, heartwarming *Lego Builder's Journey* release.

The group hasn't shied away from traditional titles, with a Gameloft partnership resulting in *Lego Legacy: Heroes Unboxed*, but we're excited to see which direction Light Brick takes next – if it remains part of the company's strategy.

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Jam City

We're still waiting for Jam City's much-anticipated IPO, but its business continues to thrive thanks to existing titles and newer releases.

The last year saw *Disney Emoji Blitz* and *Harry Potter: Hogwarts Mystery* reportedly clear \$100 million and \$154 million in revenues, respectively, while the studio also launched a new game with a major IP in the form of *Frozen Adventures*.

No doubt Jam City will continue to support its existing licensed titles for years to come, and perhaps one day its dream of an IPO will come true.

www.jamcity.com

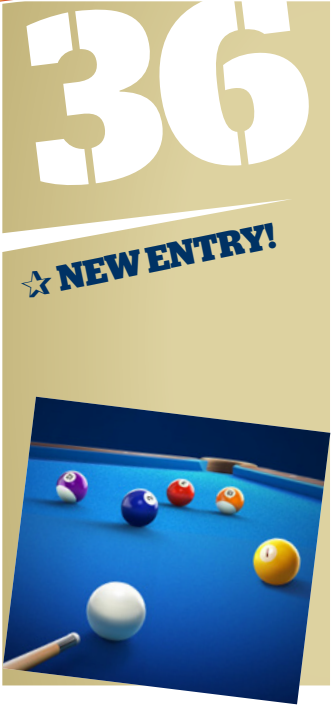
JAM CITY

Softography

Disney Emoji Blitz

Harry Potter: Hogwarts Mystery

Frozen Adventures



Miniclip

Miniclip has had a relatively quiet year, insofar as it hasn't shouted about any big games lately, but it has made some pretty interesting acquisitions in recent months.

It was reported (but never confirmed) that the company acquired Israeli developer Ilyon Games for \$100 million - a perfect fit for the firm's portfolio of casual games. And it officially bought Eight Pixels Square, adding a selection of midcore titles to its catalogue.

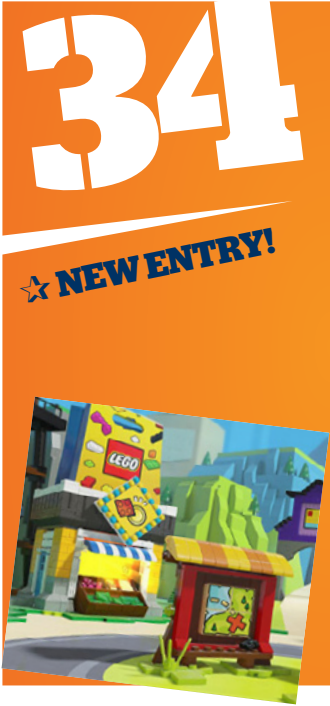
Only time will tell how recently-appointed CEO Jurgen Post plans to expand Miniclip further and which studios will join the family down the line.

miniclip.com

MINICLIP
PLAY GAMES

Softography

8-Ball Pool
Agario



Gameloft



Softography

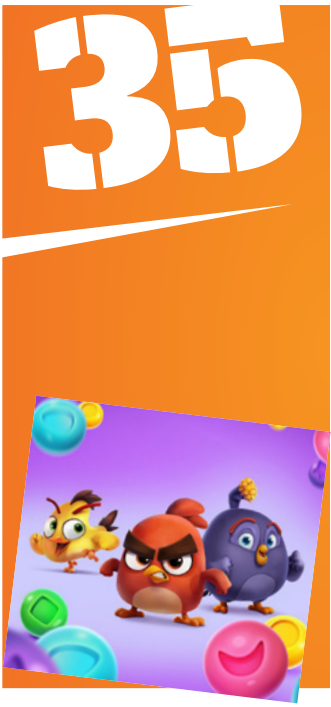
Asphalt 8: Airborne
Asphalt 9: Legends
Minions Rush
Lego Legacy: Heroes Unboxed

www.gameloft.com

Gameloft has had its ups and downs over recent years, but any company celebrating its 20th anniversary will inevitably have experienced its fair share of turbulence along the way.

And it's a developer which obviously still holds weight in the industry, securing licences from Lego and Disney for numerous games, and maintaining an average of 1.6 million downloads every single day.

With *Minions Rush* nudging ever closer to 1 billion downloads and racing stalwarts *Asphalt 8: Airborne* and *Asphalt 9: Legends* continuing to draw in revenues, Gameloft's road to its 21st birthday looks smooth.



Rovio



Softography

Angry Birds 2
Angry Birds Dream Blast
Small Town Murders

www.rovio.com

The Angry Birds franchise is now over a decade old, and while the IP may have lost a little altitude in recent years, Rovio has shown signs that it's planning to bounce back very soon.

It started 2020 with a raft of soft-launches across multiple genres, trialling games with and without the *Angry Birds* IP, and eventually acquiring midcore developer Darkfire Games and rebranding it Rovio Copenhagen.

Additionally, a new Angry Birds Netflix series on the way - and the launch of new IP *Small Town Murders* - all point to a re-energised Rovio.



Lockwood Publishing

2020 saw Lockwood's mobile virtual world/MMO *Avakin Life* surpass 200 million registered users - not bad for a game now heading into its seventh year of operation.

It's also drawing in 1.4 million daily active users, no doubt thanks to the developer's focus on running in-game events and partnering with musical acts to host gigs in the *Avakin* world.

Lockwood has further capitalised on the title's reach to go beyond games, bringing TV show *World of Dance* into *Avakin Life* for a month-long competition. It'll be interesting to see what other partnerships the developer has lined up.



Softography

Avakin Life

www.lockwoodpublishing.com

32

DeNA

DeNA may be best known to western audiences for its ongoing partnership with Nintendo on its mobile portfolio, yet it remains a strong mobile developer in its own right.

Its latest notable release is *Slam Dunk*, a 3v3 anime basketball game developed in partnership with Toei Animation, which has been an unexpected success in China and is now spreading across Asia with similarly strong sales.

Couple that with an upcoming *Dragon Quest* title, as well as whatever DeNA is secretly working on with Nintendo at the moment, and there are definitely exciting times ahead for the developer.



www.dena.com/intl

DeNA

Softography

Slam Dunk
Pokémon Masters

30

Bandai Namco



Entertainment

more fun for everyone

Softography

Dragon Ball Z Dokkan Battle
Dragon Ball Legends
Tales of Crestoria

It's no surprise that Bandai Namco's main successes in mobile come from its anime titles, especially given its involvement in some of the biggest franchises available.

From *One Piece* to *Dragon Ball*, the Japanese developer/publisher continues to see great sales from its existing titles – *Dragon Ball Z Dokkan Battle*, for example, is estimated to have cleared \$2 billion in lifetime revenues as of November 2019.

It's also shown interesting moves outside its own franchises, including working on Nintendo's *Mario Kart Tour*. Could a deeper partnership be coming down the line? Time will tell.

en.bandainamcoent.eu



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Electronic Arts



Softography

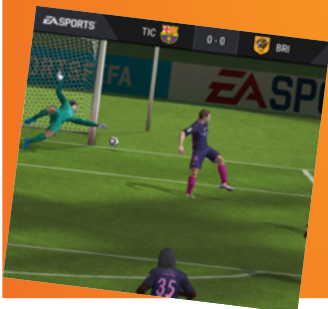
Star Wars: Galaxy of Heroes
FIFA Mobile
Plants vs. Zombies 3

EA continues to make significant revenues from long-running mobile games like *Star Wars: Galaxy of Heroes* and *FIFA Mobile*, but new releases are often few and far between.

However, recent months have seen the soft-launch of *Plants vs. Zombies 3*, a new entry in the evergreen franchise, along with promises of a few more mobile soft-launches to come.

One such soft-launch is supposedly the mobile edition of *Apex Legends*, which is a hugely tantalising prospect – if it can successfully translate the console experience onto a smaller screen, EA will be strafing all the way to the bank.

www.ea.com



29

Glu Mobile

It has been a good few months for Glu Mobile as the company has finally returned to profitability.

Glu's 2019 financials show an overall upwards trend to its bottom line, largely thanks to *Design Home*, *Covet Fashion*, and the *MLB Tap Sports Baseball* franchise, which has now cleared over 40 million downloads since its first entry.

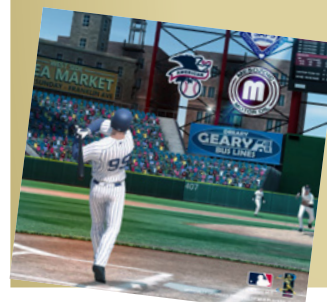
Oddly enough, the developer has also seen a huge boost to the six-year-old *Kim Kardashian: Hollywood*, which experienced a 320 per cent growth in bookings in Q2 2020. Capitalising even on its older, somewhat forgotten titles suggests Glu's approach is working.

www.glu.com

glu

Softography

Design Home
MLB Tap Sports Baseball
Covet Fashion
Kim Kardashian: Hollywood



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★ NEW ENTRY!



SYBO Games

There's no outrunning the success wave of 2012's *Subway Surfers*, a title which has now surpassed 3 billion downloads, accruing 500 million between May 2019 and August 2020.

And SYBO Games has capitalised on this success by branching out into merchandise, teaming up with Walmart, Hot Topic, and Redbubble for lines of apparel and accessories based on the series.

Co-developed with Kiloo and considered to be the most downloaded game of the last decade by App Annie, *Subway Surfers* has yet to show signs of slowing down.

www.sybogames.com

SYBO

Softography

Subway Surfers

www.tiltingpoint.com

27

★ NEW ENTRY!



Tilting Point



Free-to-play specialist Tilting Point has had a busy 12 months, from acquisitions and big IP launches to strategic partnerships aimed at bringing its games to the MENA region.

Let's start with the acquisitions: the firm acquired mobile RPG *Star Trek Timelines* from original developer Disruptor Beam, as well as the assets of FTX Games, the San Diego-based studio known for publishing *Narcos: Cartel Wars*.

On top of this, Tilting Point partnered with Nickelodeon to launch *SpongeBob: Krusty Cook-Off*, which went on to achieve an impressive 14 million pre-registrations.

Softography

Star Trek Timelines
SpongeBob: Krusty Cook-Off

26

Sony

SONY

www.sony.com

In the mobile space, Sony remains something of a mystery. Not only does it never seem to mention its moderately successful mobile studio ForwardWorks, but it also groups its anime mobile titles under its Music label.

But for all its odd approach, the firm nevertheless continues to have a strong foothold in the market, largely due to the ongoing success of *Fate/Grand Order* around the world.

The five-year-old game is still holding strong, but attention should now turn to the Japan-only *Disney Twisted-Wonderland*, an RPG/visual novel with a focus on Disney's villains that's currently picking up steam.

Softography

Fate/Grand Order

Disney Twisted-Wonderland



24

Com2uS

www.com2us.com

Summoners War may not enjoy the same level of hype as other mobile games, but it remains a strong performer for Com2uS.

The RPG recently surpassed \$2 billion in lifetime revenues from a total of 116 million downloads. The studio's work on pushing the game into the esports arena will surely only help boost those numbers.

We're also starting to see the first signs of life from Com2uS's deal with Skybound Entertainment, with the developer now working on a new *Walking Dead* game while the entertainment firm puts the finishing touches to a *Summoners War* comic book.

com2uS

Softography

Summoners War



25

★ NEW ENTRY!

Take-Two Interactive

www.take2games.com

Take-Two's focus may be its massive console franchises, but that doesn't mean its mobile output is being ignored.

The company's acquisition of Spanish mobile developer Social Point has been the key driver on its mobile front, with games like *Tasty Town* and *World Chef* leading the charge alongside long-time hit *Dragon City*. And then there's 2K's mobile offerings, including *WWE SuperCard*, which continues to perform well for the company.

Not to mention the fact the US publisher has 21 games "planned specifically" for mobile over the next five fiscal years, reaffirming its commitment to the market.

T2
TAKE-TWO
INTERACTIVE

Softography

WWE SuperCard

Dragon City

Tasty Town

World Chef



23

CyberAgent

www.cyberagent.co.jp

CyberAgent

CyberAgent is another studio that is little-known outside of Asia, but is seeing fantastic revenues regardless.

Its money largely comes from card-battler *Shadowverse* and RPG *Granblue Fantasy*, but don't discount more niche titles like *BanG Dream! Girls Band Party* and *Princess Connect! Re:Dive*, the latter of which recently launched in China.

CyberAgent has a pretty impressive future lineup too, including the much-anticipated *NieR Re[in]carnation* and a Switch version of *Shadowverse*. And it continues to operate *Dragalia Lost* in partnership with Nintendo, the latter's first and only original mobile IP.

Softography

Shadowverse

Granblue Fantasy

Princess Connect! Re:Dive

NieR Re[in]carnation





22



www.nintendo.com

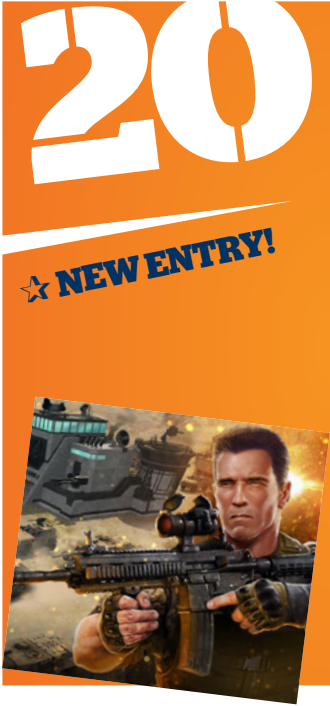
Softography

- Fire Emblem Heroes
- Mario Kart Tour
- Animal Crossing: Pocket Camp

Nintendo's mobile efforts were called into question this year, following a bad start for *Dr. Mario World* and a lack of announcements for future titles.

But it still found its successes. *Animal Crossing: Pocket Camp* saw a huge boost in sales thanks to the release of *New Horizons* on Switch, while *Mario Kart Tour* got off to an excellent start and is fast becoming a key title in the firm's mobile portfolio.

With its mobile division passing \$1 billion in lifetime revenues, one key question now is which of Nintendo's many beloved IPs will see its own mobile outing next.



★ NEW ENTRY!

20

www.applovin.com



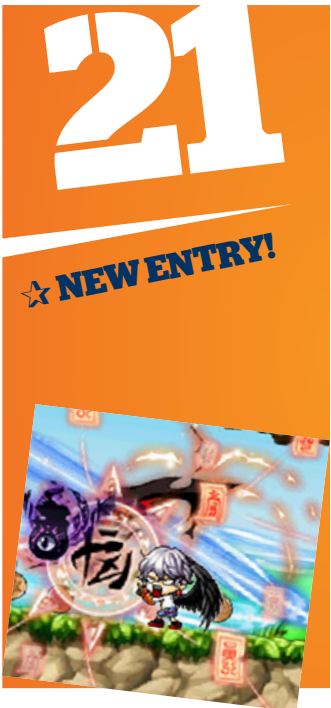
While predominantly a mobile marketing company, AppLovin's internal game output has become rather impressive over the last 12 months.

Its hypercasual outfit Lion Studios has seen games like *Slap Kings* and *Save the Girl* top monthly download charts with close to 100 million installs between them, proving it has the capability to produce serious hits.

Meanwhile, AppLovin's acquisition of *Game of War* developer Machine Zone represents a step towards the opposite end of the mobile gaming spectrum, into a far more hardcore territory. It'll be interesting to see what AppLovin has planned for this former titan of the mobile market.

Softography

- Slap Kings
- Save the Girl
- Game of War
- Mobile Strike



★ NEW ENTRY!

21

www.nexon.com



Nexon didn't have the best start in 2020, with revenues falling slightly year-on-year, but it bounced back remarkably with a record-breaking Q2.

Its mobile library has performed well over the past year, with *MapleStory M* showing good growth, recently hitting 16 million downloads. Another top performer is *KartRider Rush+*, which saw 10 million downloads in two weeks.

Nexon also picked up *FIFA Mobile* for its domestic market, which scored 1.2 million downloads within a day of launch. And all eyes are now on South Korea success *V4*, which just launched worldwide.

Softography

- MapleStory M
- KartRider Rush+
- V4



★ NEW ENTRY!

19

Stillfront Group

www.stillfront.com



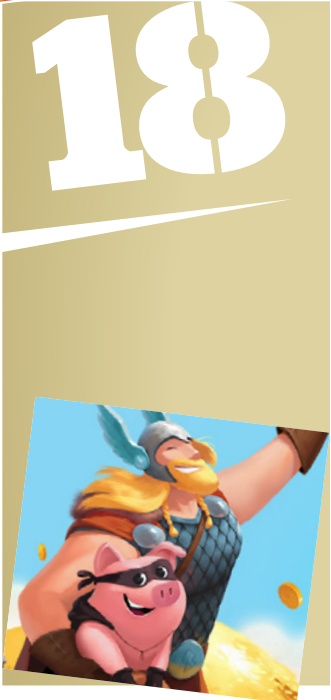
Acquisitions have proven to be very successful for the Stillfront Group. This year alone it picked up *Candywriter* and *Storm8*, in addition to the deal it struck with *Kixeye* in late 2019.

All three of those studios have aided Stillfront to secure an impressive year, with games like *Property Brothers Home Design*, *BitLife*, and *War Commander: Rogue Assault* all proving their worth in recent months.

With an evidently strong stable of developers, including *Big Farm: Mobile Harvest* studio Goodgame, the question on most lips when it comes to Stillfront is, 'who will it buy next?'

Softography

- BitLife
- Property Brothers Home Design
- Big Farm: Mobile Harvest



www.moonactive.com

Moon Active

MOONACTIVE

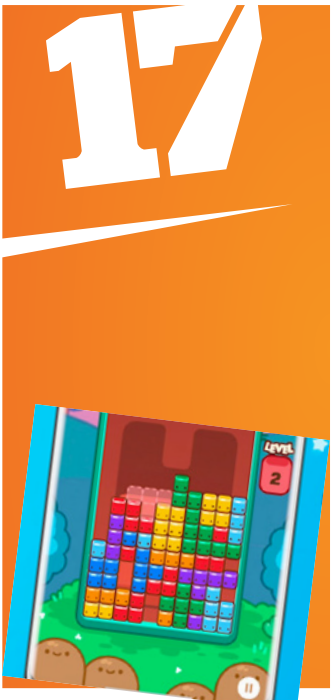
Give Moon Active's *Coin Master* a spin for a few days, and it's not hard to see why the game remains so engaging for players after four years on the market.

The title is now estimated to have cleared \$500 million in lifetime revenue and makes regular appearances in monthly top-grossing charts, so expect it to become another mobile gaming unicorn before long.

As a social casino game, it's currently toeing a fine line in many government's eyes, but the winds are steering in its favour following Germany's decision not to ban the game in its country.

Softography

Coin Master



www.n3twork.com

N3twork

Back in November last year, N3twork began making moves by announcing that it had raised \$40 million in investment for games, its Scale Platform, and its community-facing fan app.

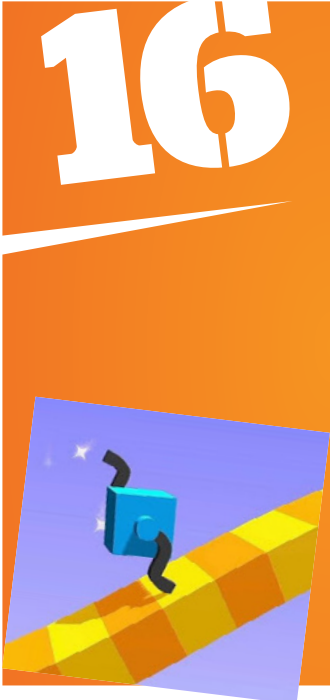
Nearly a year on and the San Francisco-based startup has put these funds to good use, releasing an official *Tetris* game and securing the rights to NBCUniversal's puzzler *Funko Pop Blitz*, all while increasing its UA performance by 25 per cent.

More interestingly, N3twork launched its \$50 million publishing fund for its scale platform, securing partnerships with Grand Cru, 99Games, and others to help grow their games.

Softography

Tetris

Funko Pop Blitz



www.voodoo.io

Voodoo

It's impossible to talk about hypercasual gaming and not mention Voodoo at some point. Even in 2020, with so many developers getting in on the genre, it remains at the top of its game as a developer and publisher.

The studio now boasts over 3.7 billion downloads and 300 million MAUs, thanks to a staggering catalogue of games too numerous to mention separately here.

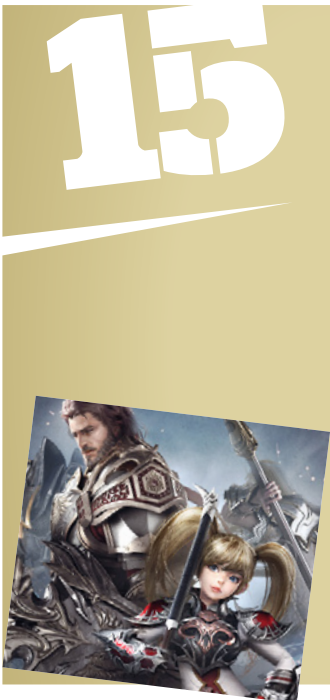
Furthermore, it appears to be making moves to evolve hypercasual as a genre, thanks to a new studio established in Montreal and the acquisition of London-based developer Gumbug.

Softography

Draw Climber

Woodturning

Spiral Roll



www.netmarble.com

Netmarble

netmarble

Netmarble struck gold earlier this year when it launched adventure RPG *Seven Deadly Sins: Grand Cross*, which hit 3 million downloads within ten days of release back in March 2020.

But it has plenty of other strong games in its arsenal. *The King of Fighters Allstar* continues to perform well, having pulled in multiple collaborations, while long-running titles such as *Marvel: Contest of Champions* and *Lineage2 Revolution* haven't stopped their contribution of large sums of revenue.

With a second game featuring K-pop icons BTS and a new Kabam-developed Marvel title currently in development, the path is trending upwards for Netmarble.

Softography

Seven Deadly Sins: Grand Cross

Marvel: Contest of Champions

Lineage2 Revolution

14

★ NEW ENTRY!



Outfit7

OUTFIT7

Softography

My Talking Tom Friends

My Talking Tom

www.outfit7.com

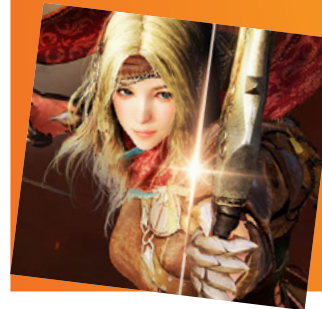
One of the most common ways of succeeding in the mobile games market is to establish a solid IP and run with it. That's exactly what developer Outfit7 has achieved with its *Talking Tom* franchise.

Launched in June 2020, latest game *My Talking Tom Friends* exceeded 100 million downloads in just over a month, adding to an already impressive 13 billion downloads across the company's catalogue.

It will be fascinating to see how Outfit7 plans to not only keep the existing audience happy, but draw in new players further down the line, too.

12

★ NEW ENTRY!



Pearl Abyss

South Korea-based studio Pearl Abyss has made a splash into the mobile market this year by bringing its highly beloved *Black Desert Online* game to mobile devices in the west.

The MMORPG has gone on to become a huge success, accumulating more than 20 million downloads within its first two months on the mobile platform and helping push revenue for the series as a whole past the \$1.5 billion mark.

Pearl Abyss is now set to enter its final expansion phase for *Black Desert* before looking to launch its next title in the last quarter of 2021.

www.pearlabyss.com

PEARLABYSS

Softography

Black Desert Mobile

13



Playtika

Playtika has certainly had an interesting year, with subsidiaries Wooga and Seriously continuing to perform well through their *June's Journey* and the *Best Fiends* franchise, which cleared \$285 million in lifetime revenues in late 2019.

Playtika has also been engaging in a number of charitable acts through its games, with *Bingo Blitz* donating meals to Feeding America while the studio donated its own catered meals to local communities to help out during the pandemic.

Wooga CEO and founder Jens Begemann may have left to pursue new ventures, but Playtika looks to be perfectly safe hands to leave the developer in.

www.playtika.com



Softography

June's Journey

Best Fiends

Bingo Blitz

11



Epic Games



Softography

Fortnite

There's a debate to be had around whether Epic Games counts as a mobile developer - especially now that *Fortnite* is no longer available on the App Store or Google Play.

But there's no denying the company's presence on the market, particularly given that *Fortnite* recently cleared \$1 billion in estimated mobile lifetime revenues just two years after its small screen debut.

Epic's future on mobile is in turmoil at the time of writing, but if it does successfully force Apple and Google to lower their revenue cut from games and apps on their stores, it'd be a hugely significant win for developers everywhere.

www.epicgames.com

10

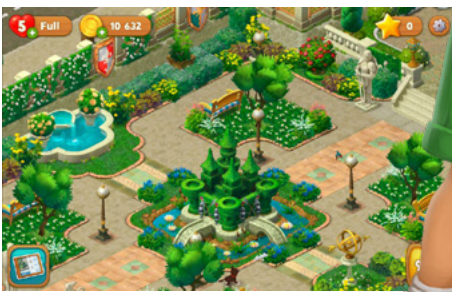
Playrix

playrix

Softography

Gardenscapes

Homescapes



www.playrix.com

Playrix has been a dominant force in the casual mobile gaming space for some time now, and the last 12 months has seen it go from strength to strength, thanks to a string of acquisitions, impressive revenue milestones for its evergreen titles, and interesting moves for the future.

When we spoke to Alexander Derkach, Playrix's head of marketing, at the end of 2019, the studio had made eight acquisitions, bringing its total headcount to 1,700 people. And it didn't stop in 2020, picking up Plexonic and Cateia Games within a few months of each other, strengthening its presence across Europe as a result.

The studio's games haven't slacked off either. Flagship title *Gardenscapes* surpassed \$1.5 billion in revenue just over three years after launching, while its follow-up, *Homescapes*, cleared \$1 billion just after its second birthday.

Future games are looking rather strong as well. It's already launched *Wildscapes*, a more traditional match-3 experience combined with Playrix's narrative-led metagame, and it has *Farmscapes* currently in soft-launch, which follows in *Gardenscapes*' footsteps a little more closely.

But it's also branching out of its comfort zone with hidden object title *Manor Matters* and match-3 RPG *Puzzle Breakers*, both exciting new avenues for the developer.

With its top titles continuing to bring in money, and new ventures starting to take form, Playrix's future feels very well grounded. We look forward to seeing how much more it can grow over the next year.

9

Activision Blizzard

www.activisionblizzard.com

ACTIVISION | BLIZZARD

In previous Top 50 editions, we've targeted King as its own company, largely strafing past owner Activision Blizzard due to the parent company's focus on console, leaving King to take point when it came to all mobile operations.

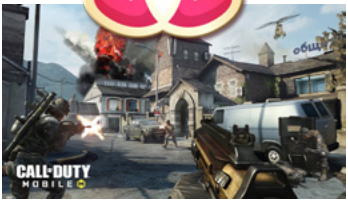
But since our 2019 list, Activision has unleashed a monumental assault on the mobile landscape in the form of *Call of Duty: Mobile*, effectively bringing the companies' mobile game might into step.

Call of Duty: Mobile has been nothing short of a phenomenon, generating 100 million downloads in its first week - reportedly making it the fastest mobile game to ever hit that figure - and growing that figure to 250 million just eight months after initially launching.

Sensor Tower figures estimate that it's also generated \$327 million in lifetime spend, \$60 million of which came from its launch month alone. And it swept up a surprising number of industry awards to boot, nabbing a BAFTA, Google's Game of the Year, and a nod from the Game Awards, among numerous other nominations.

King hasn't exactly been resting on its laurels either, of course. Largely thanks to the coronavirus pandemic, its revenues have grown to the highest they've been since Activision Blizzard's acquisition, with MAUs also climbing to 271 million.

All sights are now trained on two mobile outings for major IPs, with Blizzard's *Diablo Immortal* progressing through internal testing and King's *Crash Bandicoot: On the Run* in soft-launch. And all the while, *Call of Duty: Mobile* forges ahead.

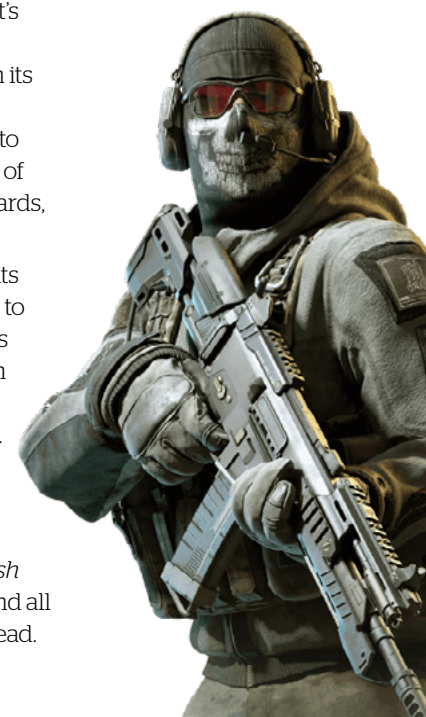


Softography

Candy Crush Saga

Call of Duty: Mobile

Diablo Immortal



8

Supercell

Supercell has been slipping and sliding around recent Top 50 editions - it remains a powerhouse in the mobile gaming market, but has had its third consecutive year of falling revenues.

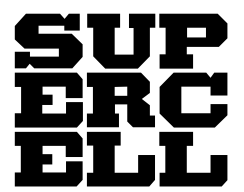
Of course, even with a yearly decrease, the developer's 2019 revenue came to \$1.56 billion from just five games - impressive, no matter how you slice it. And with people stuck in lockdown earlier this year, you'd expect that figure to grow for 2020.

Let's remember *Clash Royale* has now cleared an estimated \$3 billion in revenue just over four years since launch. And its most recent game, *Brawl Stars*, has finally landed in China, where it got off to a respectable start thanks to first-week revenues of \$17.5 million.

All that said, Supercell's future is looking a little odd right now. For one, its much-anticipated *Rush Wars* was cancelled not long after being soft-launched, largely because the developer failed to "find the fun". And the studio currently has *Hay Day Pop* in soft-launch, a match-3 puzzler using an older IP that marks a huge departure for the Finnish developer.

Still, we know that Supercell only launches a new game when it's guaranteed to be a billion-dollar release, so whatever it's working on now that is allowed to see the light of day will almost certainly set chins wagging, match-3 or not.

www.supercell.com

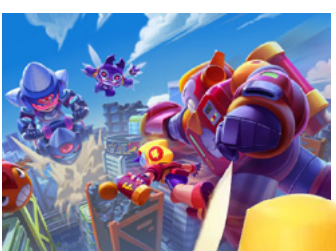
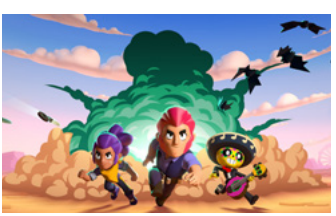


Softography

Clash of Clans

Clash Royale

Brawl Stars



7

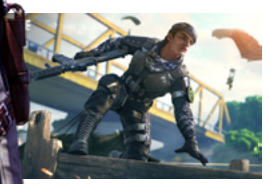
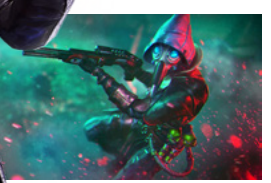
★ NEW ENTRY!

Sea



Softography

Free Fire



www.seagroup.com

It's entirely possible that, if you're working in the western market, you've not heard much about Sea and its gaming division, Garena. But you'll almost certainly have heard of the games it's worked on in Southeast Asia.

Take *Speed Drifters*, the name Tencent's *QQ Speed* goes under outside of China. Or *Arena of Valor*, another Tencent title it operates outside of the behemoth's home country, where it's known as *Honor of Kings*. And who can forget *Call of Duty: Mobile*, which proved so popular for Activision?

But the cherry on top of Garena's ice cream is *Free Fire*, an enormously popular battle royale that's given the likes of *PUBG Mobile* and *Fortnite* a run for its money in recent years.

It's already cleared \$1 billion in lifetime revenues, around two years after launch, from 450 million registered users. And, according to Sea's Q2 2020 financial release, the game now sees over 100 million daily active users, helping it become the highest grossing mobile game in Latin America and Southeast Asia for that quarter.

It's seriously impressive stats for a game that still has some markets left to capture, but with *Fortnite* now out of the race for the time being, we could see Garena muscling in on the game's market share in the US and Europe before long.

www.roblox.com

Roblox

ROBLOX
Powering Imagination

Softography

Roblox

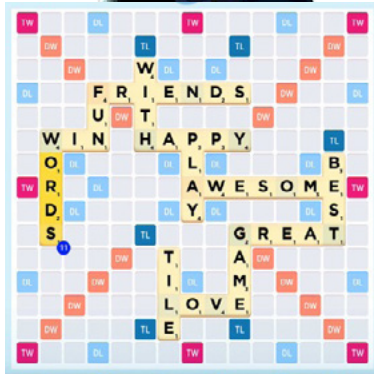
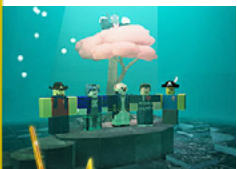
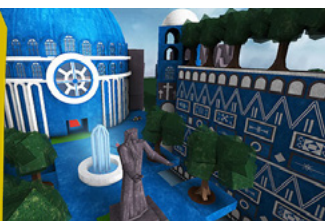
What can be said about Roblox that hasn't already been said? The company and its gaming platform are nothing short of a phenomenon, and 2020 has seen it firmly cement its place in the mobile ecosystem.

For starters, *Roblox* on mobile surpassed an estimated \$1 billion in revenue in November 2019, and added another \$500 million to that figure within just seven months. And thanks to a \$150 million funding round in February 2020, the company is now valued at \$4 billion.

It's not just *Roblox* that's raking in the cash, either. Developers using the platform to sell their own experiences are currently on track to make \$250 million, with some teams hitting over a million concurrent players on their products.

But all that pales in comparison to the fact that *Roblox* is currently played by over half of children under 16 in the US. Furthermore, it's worth noting that a large number of the game's developers themselves are under 18, meaning its huge audience is also creating content for their peers, and getting paid for it in the process.

With online communities now more important than ever, *Roblox* may well be on track to have its best year ever in 2020, and now it's a question of how it will capitalise on that milestone and grow for the future. Dismiss it as "just a kid's game" at your peril - it's so much more.



www.scopely.com

Scopely

Scopely's rise through the Top 50 ranks is nothing short of meteoric - only two years ago it clocked in at #33, before leaping into tenth place for 2019. And now, thanks to an already stellar 2020, it's climbing ever higher.

It all started with a \$200 million series D funding round in October 2019, which ended up being topped off with an additional \$200 million in March 2020.

And that money went straight to work, with the publisher acquiring FoxNext Games, along with games *Marvel Strike Force* and the in-development *Avatar: Pandora Rising*, and its very own console developer in the form of Cold Iron Studio.

But it hasn't forgotten its casual roots either, with *Scrabble GO* launching in March 2020 and reportedly experiencing the best launch week of a mobile word game of all time. Scopely snapped up the game's developer, PierPlay, a month after launch.

To top it all off, it's made several key hires, including former Rogue Games founder and CEO Mike DeLaet as its new SVP of strategic partnerships, while ex-Product Madness MD Daniel Freireich became its president of games.

With plenty of funds raised and games doing well across the board, Scopely is well positioned to become an even more powerful force in mobile gaming - next year's Top 50 list should tell us.



Softography

Scrabble GO

Star Trek Fleet Command

Marvel Strike Force



4

Niantic

***Pokémon GO* is a game designed almost entirely around going outside, and if there's one thing 2020 will be remembered for, it's everyone in the world doing the exact opposite.**

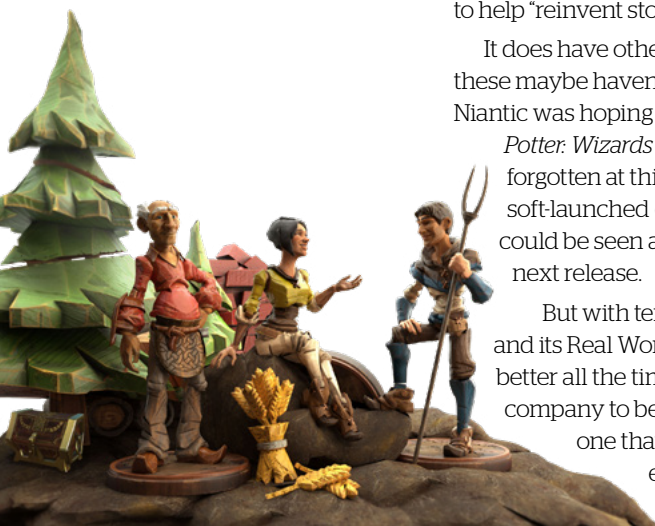
With this in mind, it's frankly amazing that *Pokémon GO* has not only successfully managed to turn itself into a game that can be enjoyed from the comfort of your own abode, but that it's experienced its second-best year of revenues since launch during that period.

Niantic hasn't just kept its spoils to itself, either. It made a huge donation to Black charities and communities using proceeds from 2020's *Pokémon GO* Fest, and it provided free advertising for businesses across the world in-game to help out when the pandemic was at its peak.

But Niantic's business doesn't begin and end with its monster capturing title. It acquired 6D.ai to help further its AR technology, and it's partnered with interactive theatre company Punchdrunk to help "reinvent storytelling".

It does have other games too - though these maybe haven't been the success Niantic was hoping for. *Ingress*, and *Harry Potter: Wizards Unite* have been all but forgotten at this point, and the soft-launched *Catan - World Explorers* could be seen as an odd choice for its next release.

But with ten games in development and its Real World Platform getting better all the time, Niantic remains a company to be reckoned with - and one that can clearly survive even the toughest times.



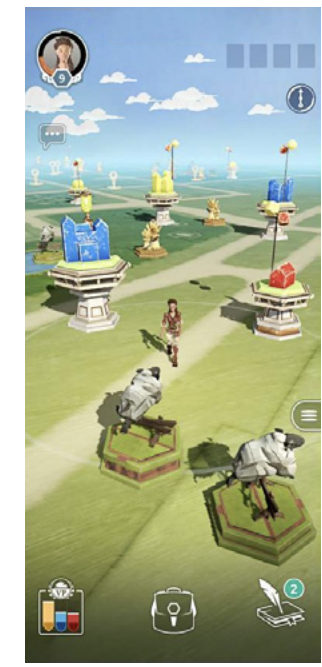
www.nianticlabs.com



NIANTIC

Softography

- Pokémon GO
- Harry Potter: Wizards Unite
- Catan - World Explorers



3

Tencent

腾讯
Tencent

Softography

- PUBG Mobile
- Pokémon Unite
- Honor of Kings

Tencent's presence in mobile is unavoidable. Look over this list and you're sure to find plenty of companies that have at some point received investment from the Chinese behemoth, and some that may even be owned by it, if only indirectly.

But Tencent is a phenomenally huge publisher and developer in its own right, and outside of all its investments and acquisitions, it has a thriving mobile business all of its own.

A large part of that comes down to internal team TiMi Studios, the developer behind the beast that is *PUBG Mobile* and China-only sister title *Game for Peace*, which cleared \$3 billion in revenues in July 2020 and is consistently one of the top-grossing games across the mobile market.

TiMi is also partnering with SNK to bring beloved run-and-gun series *Metal Slug* to mobile with a new game, and with The Pokémon Company on *Pokémon Unite*, an arena battler that bears a striking resemblance to *Honor of Kings* - which, by the way, is also still incredibly successful.

Tencent still continues to invest heavily, of course, most recently picking up a minority stake in Voodoo, but also acquiring shares in Sumo Digital and PlatinumGames, to name just three. It's even helped Nintendo bring its Switch to China, but that's another story for another list.

Clearly, Tencent isn't going anywhere, and you can expect the giant to continue lumbering around the higher reaches of our Top 50 list for many years to come.





NetEase



Softography

- Harry Potter: Magic Awakened
- Lord of the Rings: Rise to War
- Marvel Duel



www.neteasegames.com

NetEase is another Chinese colossus that keeps on growing and doing ever more exciting things in the mobile space, but its future right now - especially for western gamers - is perhaps its most appealing yet.

Not that its games in China are slouching, of course. Its *Fantasy Westward Journey* game series, which includes a recently-released 3D edition, continues to do the numbers in the publisher's home country, for example.

And its licensed titles consistently see pretty staggering results - like its 4v1 take on Tom and Jerry, which accrued over 100 million players within its first year of release.

Indeed, its ability to acquire and effectively utilise licences is precisely what makes NetEase so exciting currently, with a trio of games being of particular interest: *Marvel Duel*, *Lord of the Rings: Rise to War*, and *Harry Potter: Magic Awakened*.

The first two are already in soft-launch, while *Magic Awakened* is currently in beta in China and may never see the light of day beyond the country, but all three have the potential to be huge hits if done right.

NetEase also has its eyes on the future, setting up a new development studio in Tokyo specifically for next-gen games, including mobile. And on top of all that, it's listed itself on the Hong Kong Stock Exchange, reportedly raising \$2.7 billion in the process.

How these partnerships and investments will play out is too early to assess, but NetEase's performance in next year's Top 50 should offer some guidance.



Zynga

We thought in 2019 that Zynga had done a fantastic job turning its business around, finally getting the most out of the mobile market, and growing rapidly. But we had no idea about its plans for 2020.

In particular, the eye-watering acquisition of Turkish developer Peak Games for \$1.85 billion shook the mobile industry, and marks a clear faith in the continued performance of the developer's main games *Toy Blast* and *Toon Blast*.

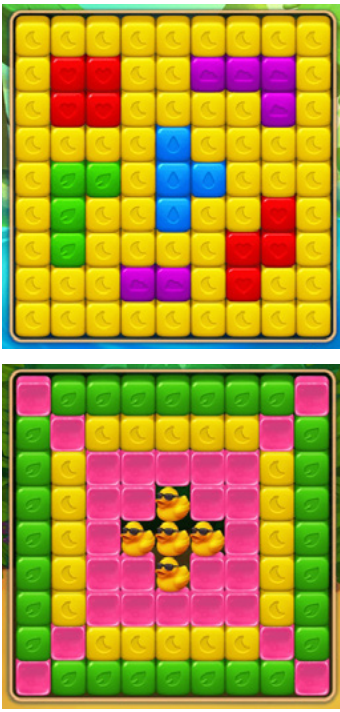
But Zynga continues to explore new avenues, too. It picked up hypercasual studio Rollic for \$168 million, marking its first foray into the fastest-growing genre out there, released *Word Pop* for Amazon's Alexa, and has signed a multi-game deal with Snapchat.

Existing titles and studios continue to perform well - *Empires & Puzzles* has cleared \$500 million in lifetime revenues, while NaturalMotion has opened a new office in Birmingham.

And it already has a huge licensed game in soft-launch, with match-3 puzzler *Harry Potter: Puzzles and Spells* in development thanks to a partnership with Portkey Games and Warner Bros.

We already know Zynga isn't planning on slowing down its M&A strategy, and with over \$2 billion spent on new studios this year alone, it clearly isn't scared of splashing the cash to get where it wants to be.

Zynga is the shining example of a fast-growing, successful mobile developer with an exciting future ahead - and why it's topped our Top 50 Mobile Game Makers list for the second year in a row.



www.zynga.com



Softography

- Toon Blast
- Zynga Poker
- Harry Potter: Puzzles and Spells



Top 50 Developer 2020: At-a-glance

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☆ - NEW ENTRY for 2020 list

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ATTENDEES



250+
SPEAKERS



680
COMPANIES



3,000
MEETINGS



68
COUNTRIES

PLUS!
FINN-TASTIC
FRINGE
EVENTS

SEP 14-18
POCKETGAMER
CONNECTS
CAREERS
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Investor
Connector

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mentor
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The
BIG
INDIE
PITCH
MOBILE + PC + CONSOLE EDITION

PUBLISHER
SPEED
MATCH

POCKET GAMER
2020
SESSIONS

POCKET
GAMER
5
HELSINKI

www.pgconnects.com/helsinki