



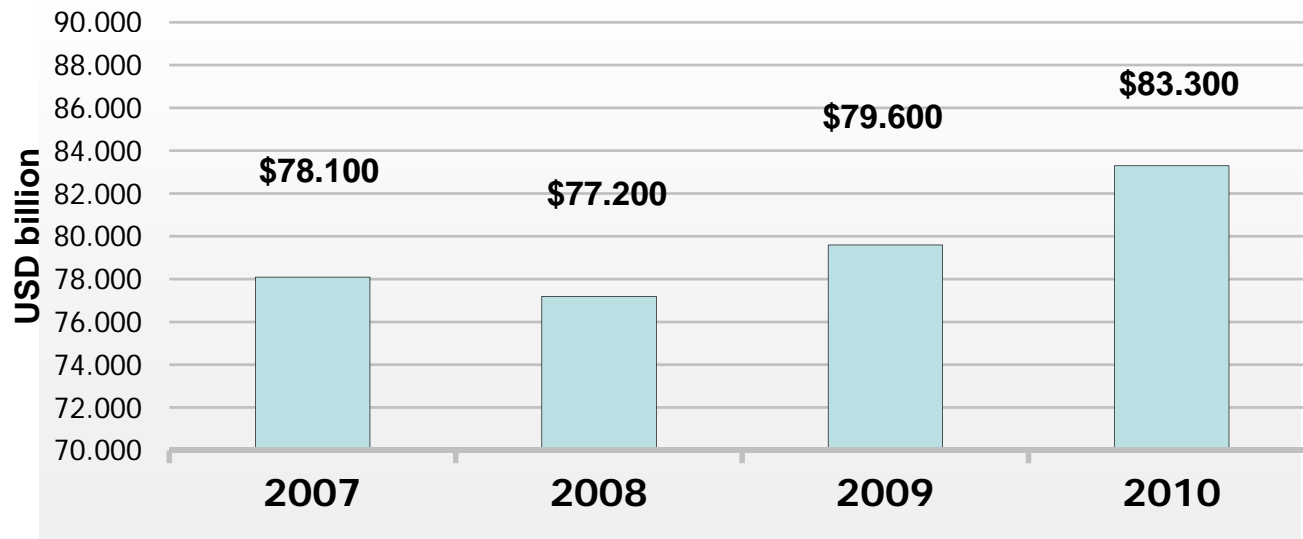
THE NPD GROUP

toys

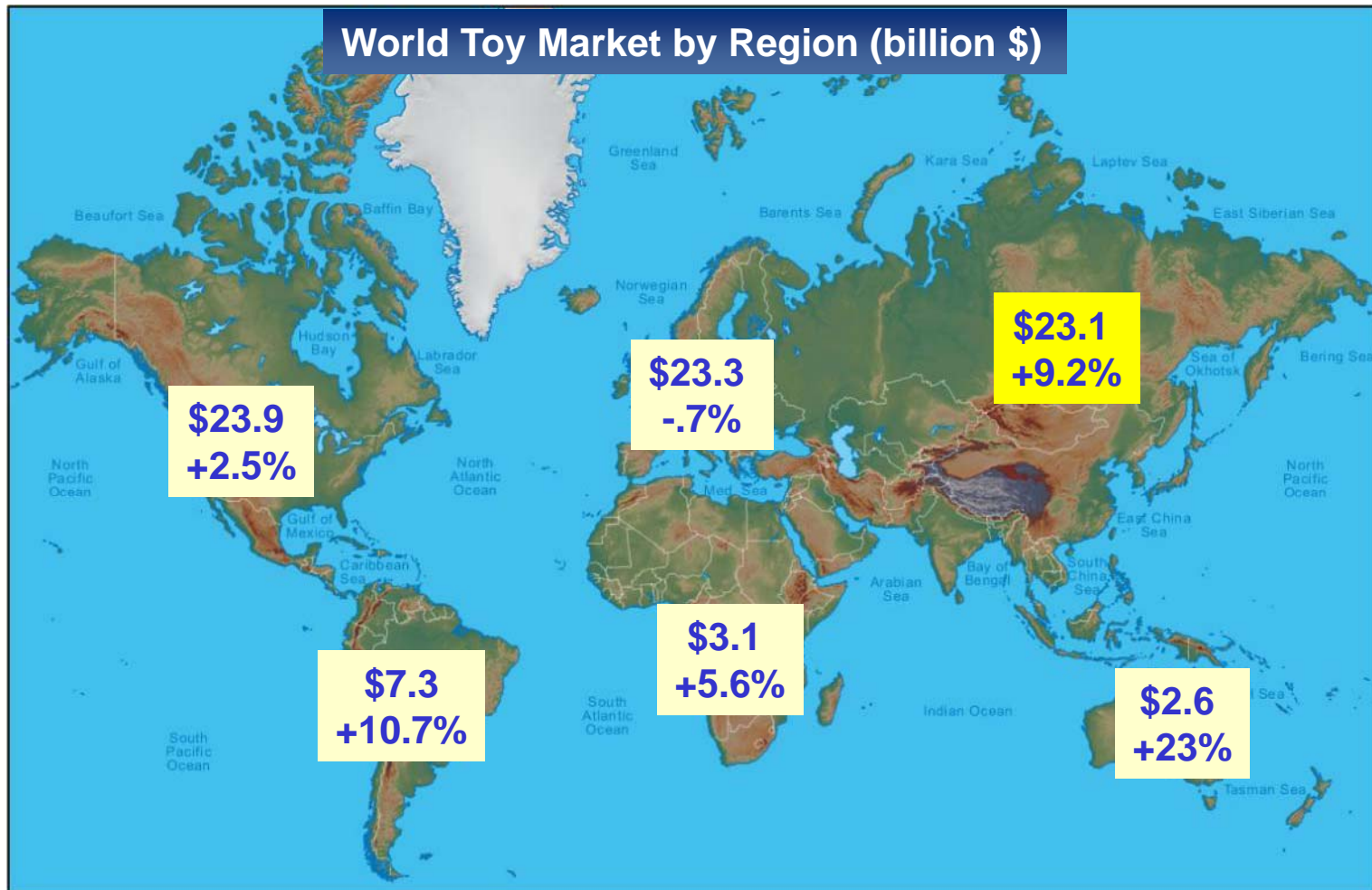
The European Toy Market in 2011
Specially prepared for ICTI
May 2012

2010 Results --A growing market (up 4.7%)

World Toy Market (billion \$)



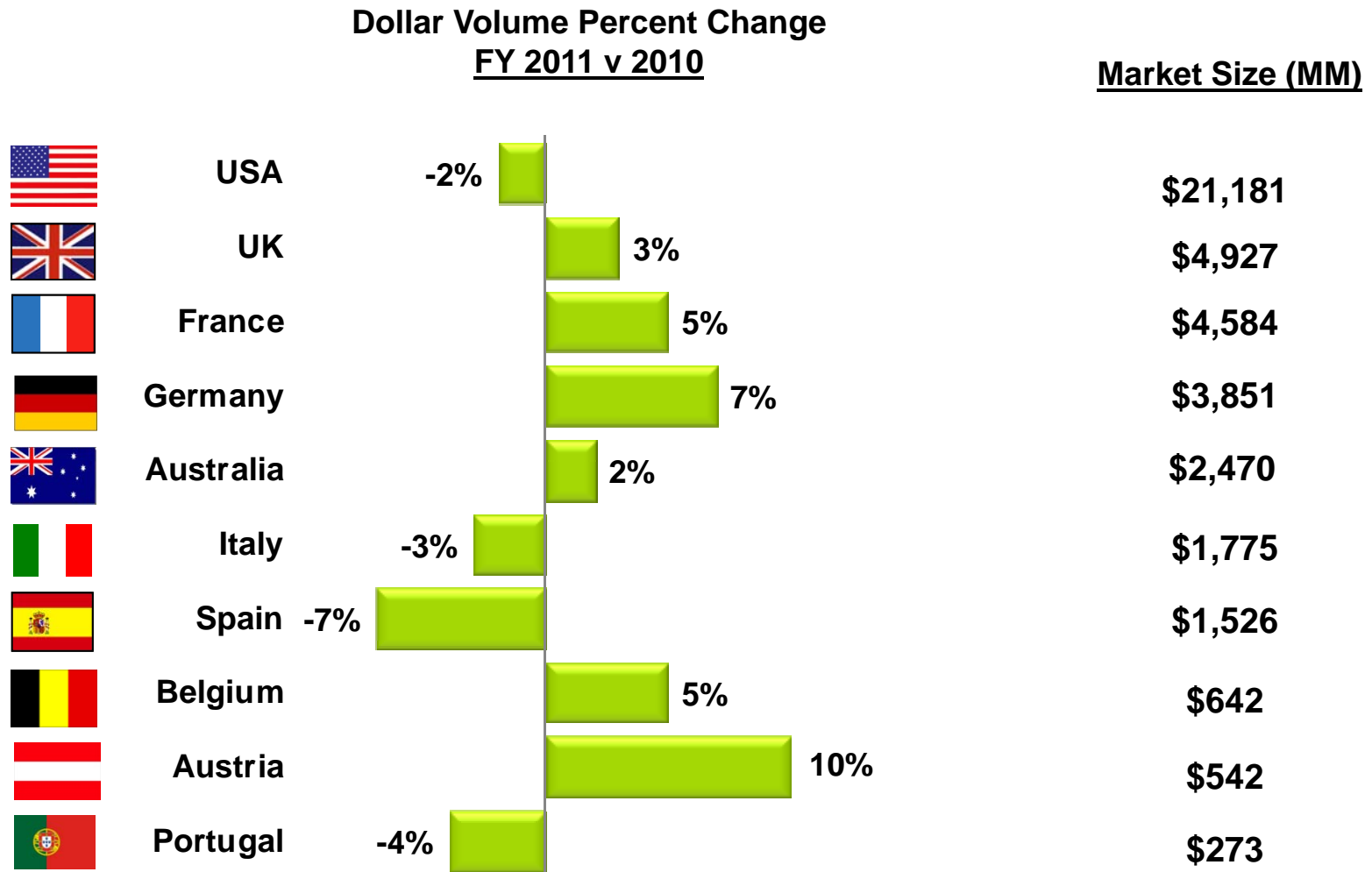
2010 toy revenues by region (billions of \$)
North America, Europe and Asia are now relatively equal in size



**Europe 5:
+3% in 2011**

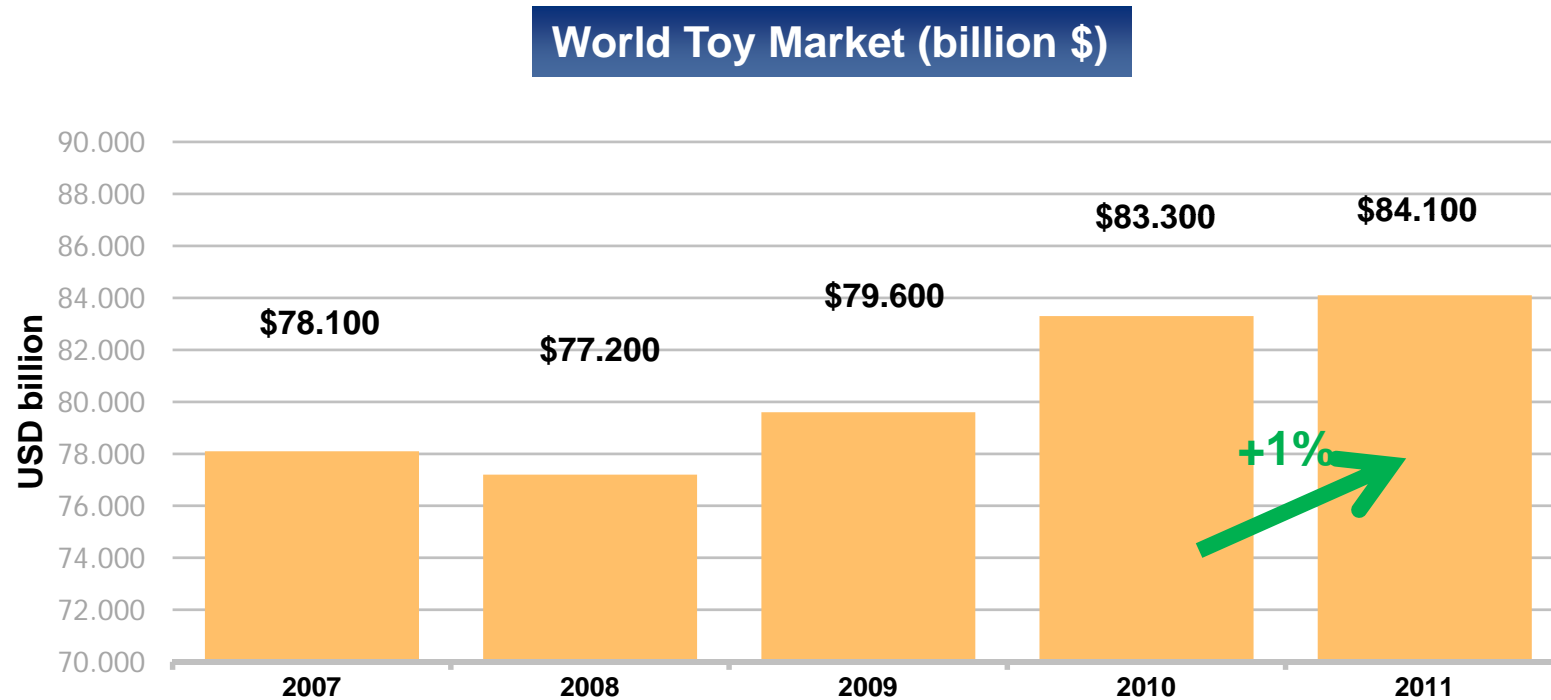
Full Year 2011 v 2010

Total Toy Industry by Country Ranked by Market Size in U.S. Dollars at 100% of Total Toy Industry



2011 Forecast for the World Toy Market: +1% globally

- Europe gain expected to be offset by US loss
- Reported in USD G5 however will be down about 1%...



Key Highlights



Beyblade Tops Charts In 2 Countries

■ Top Value Selling Toy By Country 2011





Tablets for all in continental Europe in 2012?

- **1 in every 11 UK kid aged 3-6 received a 'toy' tablet for Christmas**



- **Approximately 250,000 tablets were sold in the UK in 2011**
- **Preschool electronic Learning rose by 43% for the year (Total preschool +2%)**



Online Channel growth changing shopping habits & Store closures threats



App' Toys & Tablets the new buzz?



Growth in Virtual Shops & Mobile Shopping



Increased Digital Gaming Into Toys & Into Europe

- NPD Retail Tracking Coverage by country
 - UK 78%
 - France 70%
 - Germany 72% - weekly data 63%
 - Spain 73%
 - Italy 59%

- NPD Consumer Panel Service – Full Year 2011

- Exchange Rate used £1 = €1.1626 (unless otherwise specified)

- All value numbers are in Euros (unless otherwise specified)