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Toy Markets in the World Annual 2010

Presented to ICTI

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The Concept behind the Worldwide Projections

- The primary factors that drive toys and games market consumption are:

- Population by core age groups
- GDP per inhabitant

Changes in both of these factors contribute to changes in market size.

- The business-as-usual projection of the toys and games market sizes historically have been produced using projections of these driving variables provided by IMF, the U.N., and The NPD Group.

- The framework assumptions

- **The richer the country, the higher the Average Expenditure in Toys per Child (AETC)**
- **The richer the country, the higher the proportion of consumers age 15 years old and older.**

Sources of information

Population

- World Population, International Database, Dec. 2010
U.S. Census Bureau, International

Macro-economics

- World Economic Outlook Database, Oct. 2010
International Monetary Fund

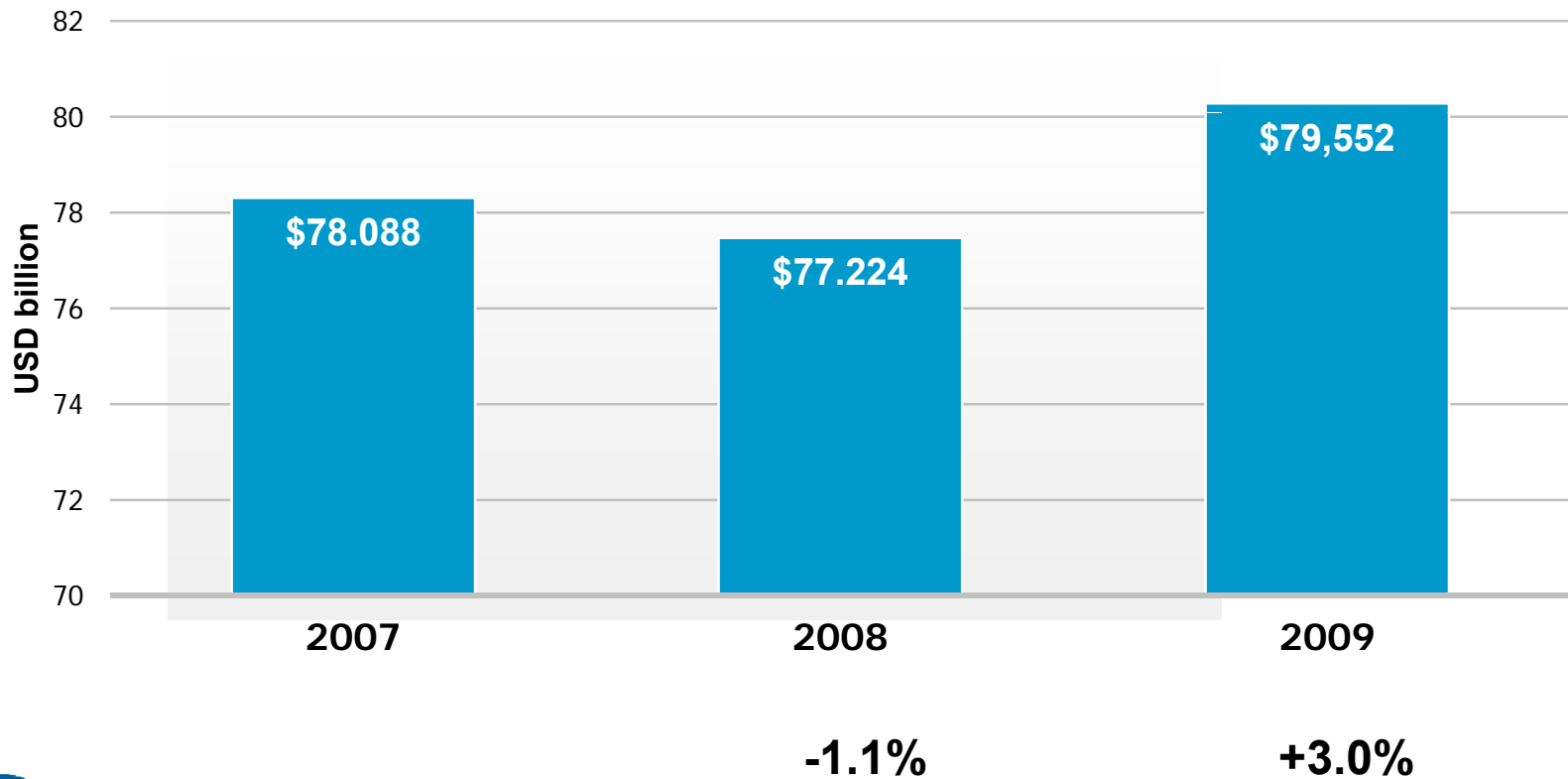
Existing Toy Markets

- Australia, Austria, Belgium, France, Germany, Italy, Poland, Portugal, Spain, UK, U.S.A. - ***The NPD Group***

- All calculations have been made in U.S. \$. Exchange rates are as of December 2009 & December 2010.

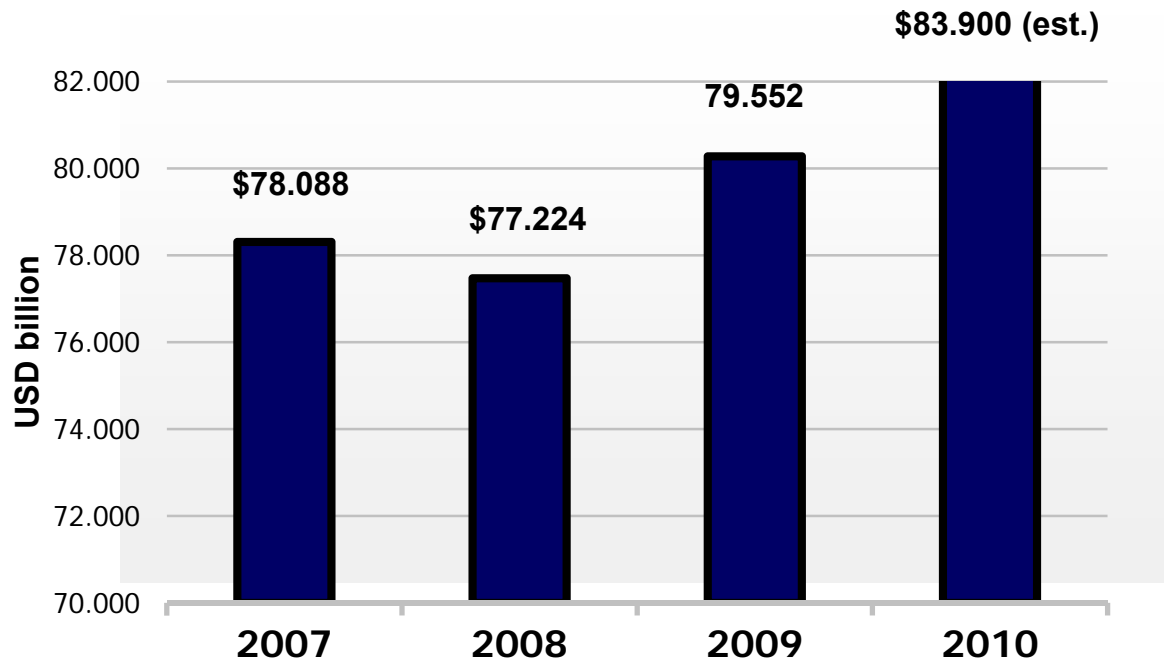
In 2009, NPD estimated the Global Toy market at just under \$80 billion USD

World Toy Market (billion \$)

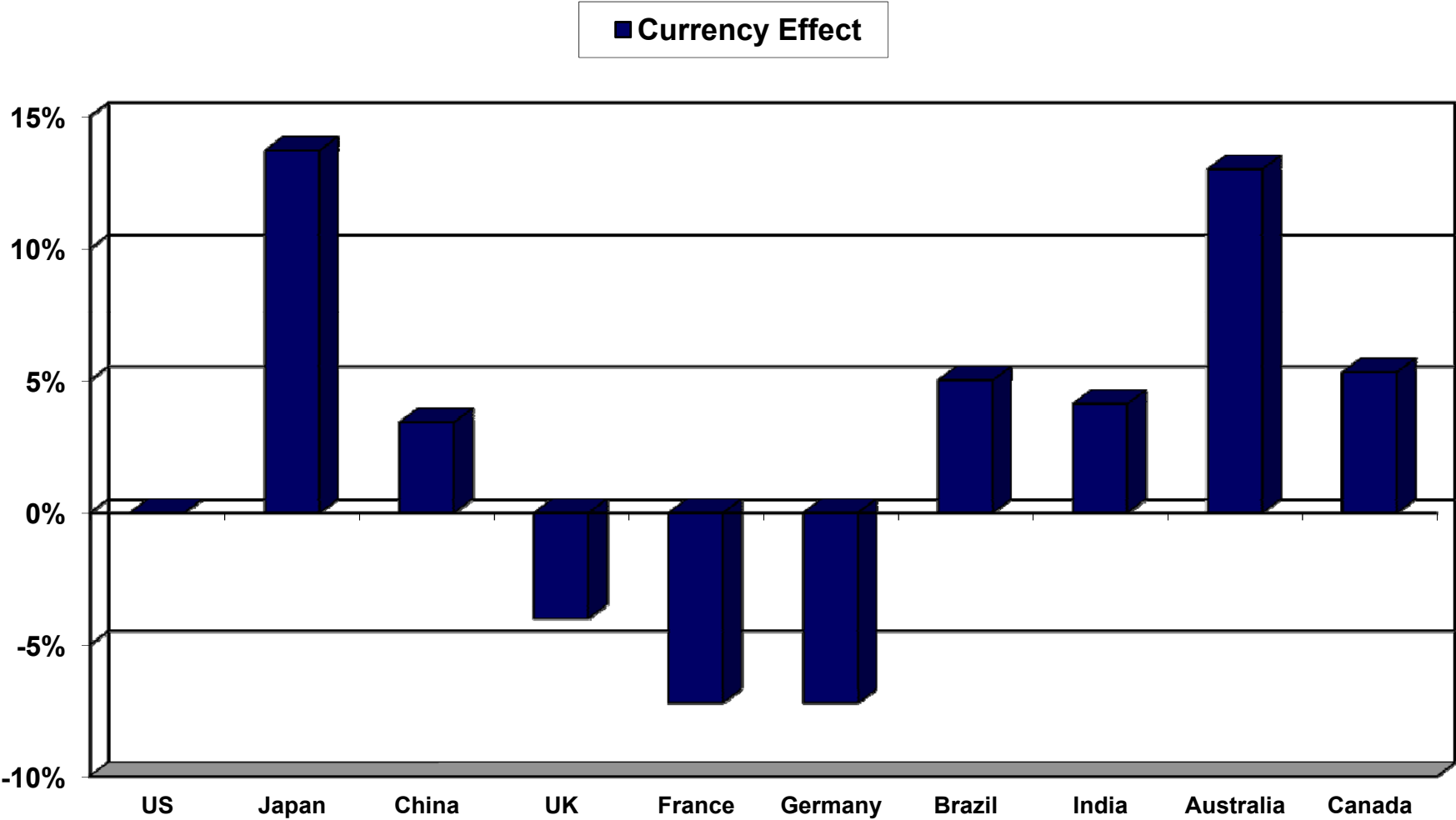


NPD was optimistic and forecasted the toy market to continue to grow in 2010.

World Toy Market (billion \$)



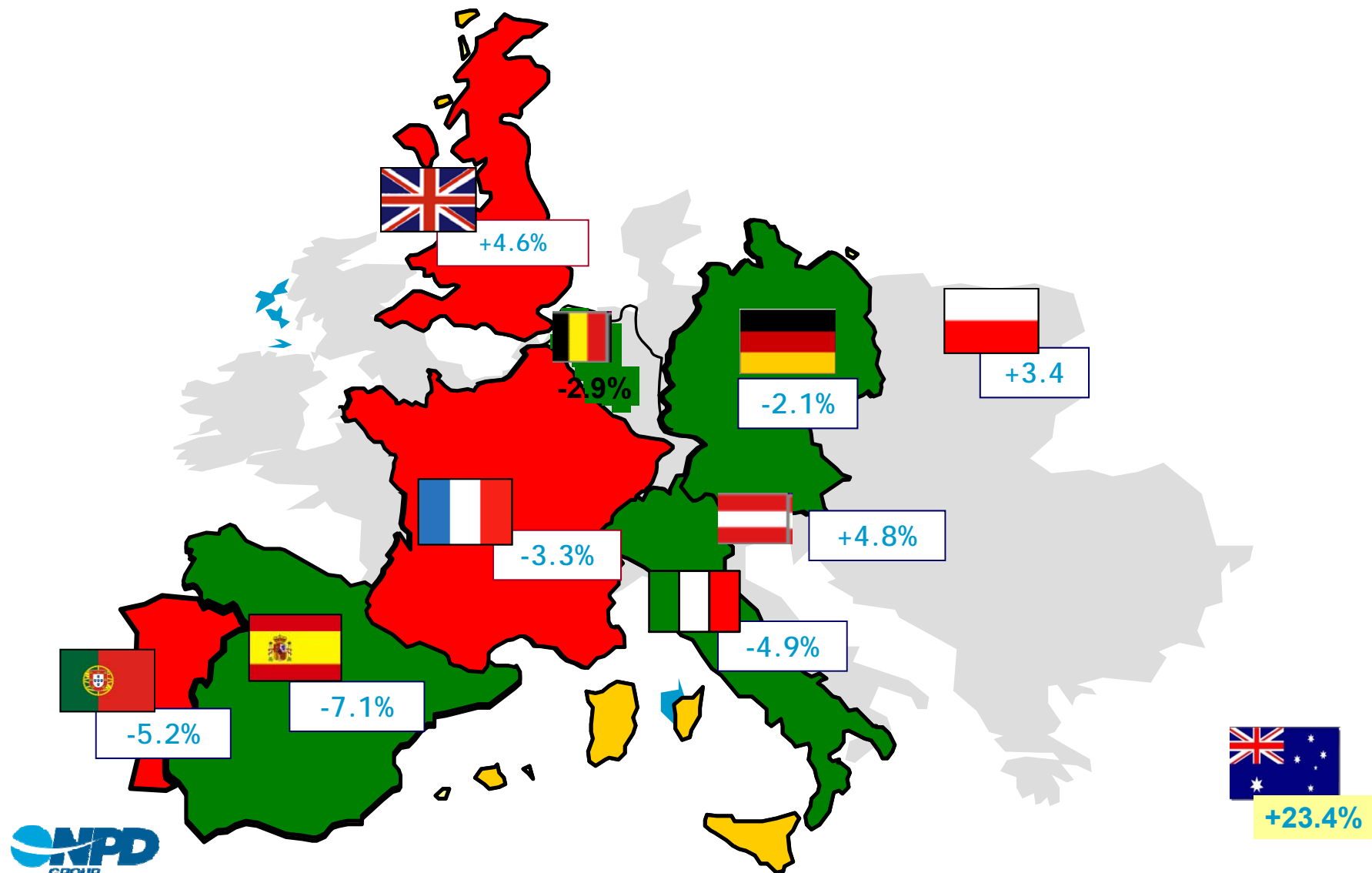
Impact of FX on Top 10 Markets: Not all are as bleak as those trading the EURO



If there was no growth in local currency what would the market size trend be in USD?

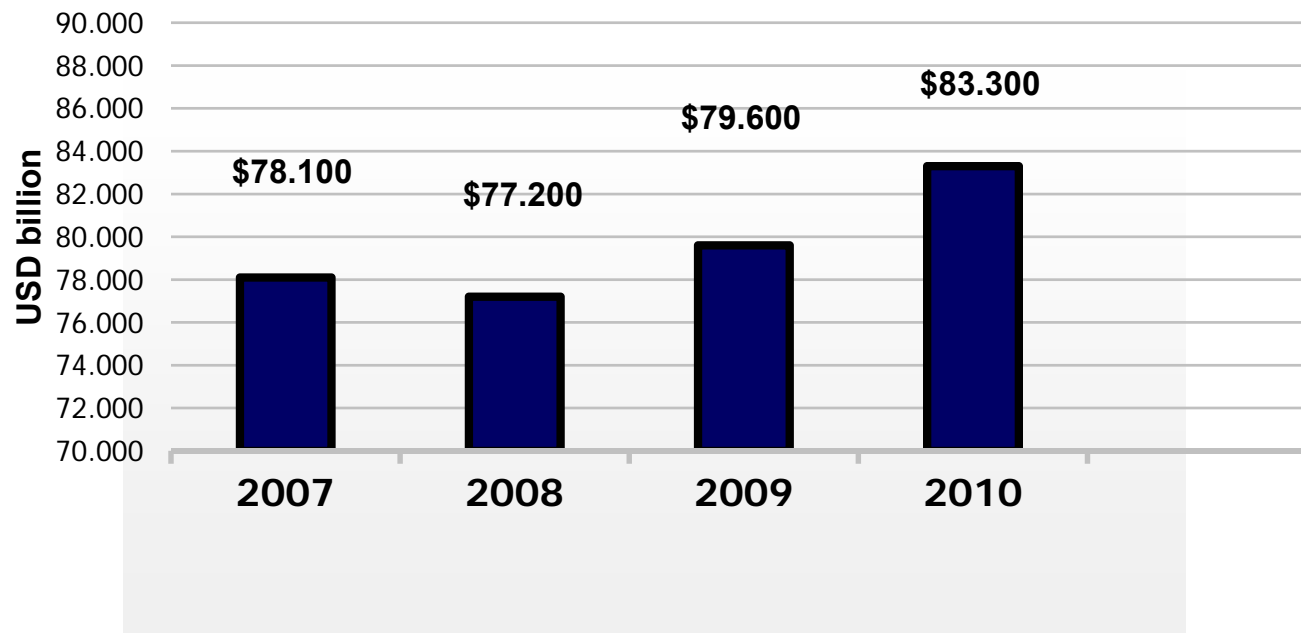
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European Toy Market Trends 2010 (Value) restated in USD Trends

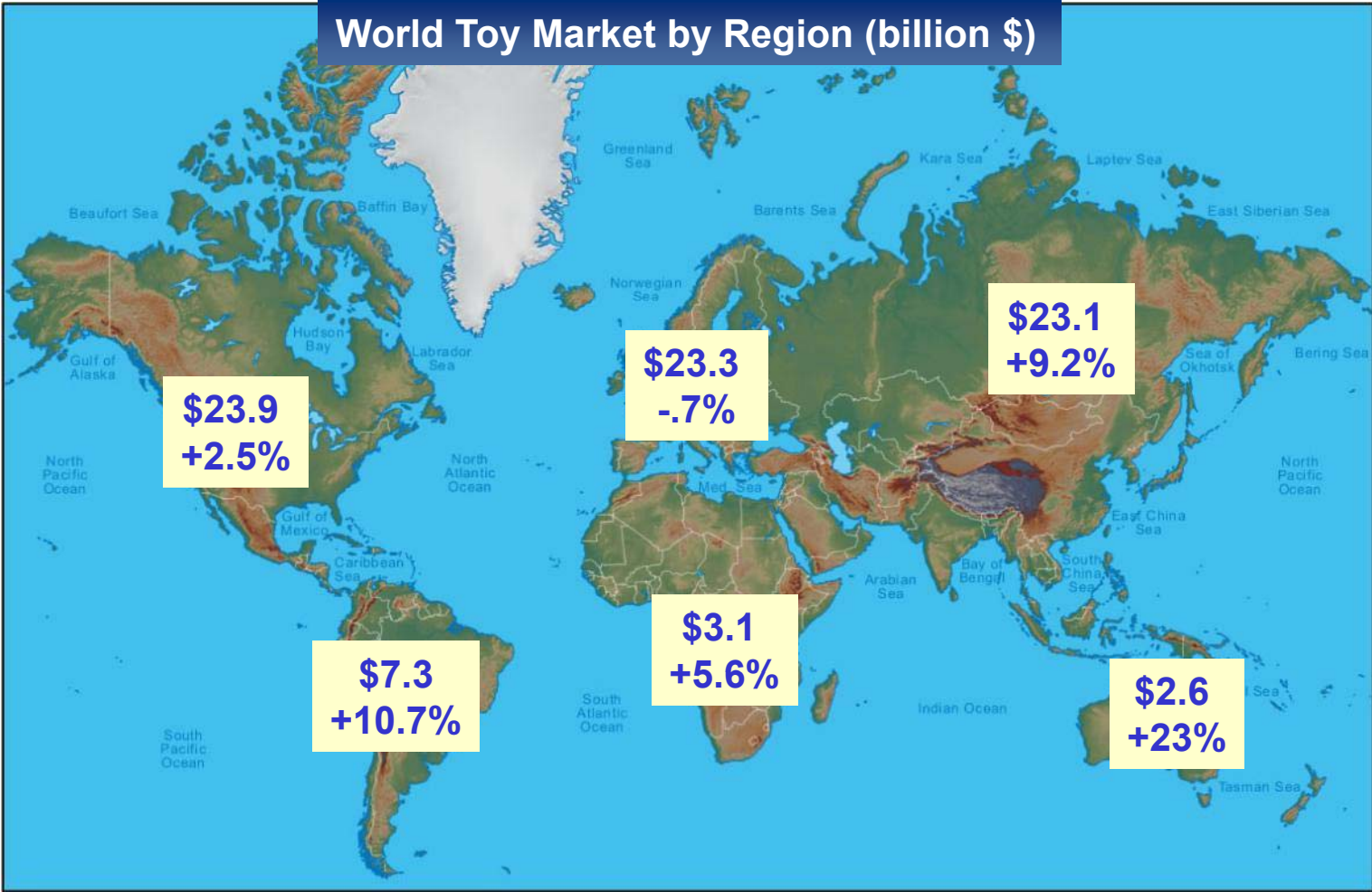


2010 Results were in line with NPD's optimistic forecast- A growing market (up 4.7%)

World Toy Market (billion \$)



2010 toy revenues by region (billions of \$)





Top Countries

2010: Top 10 still represent 2/3 of total

Country Rank	Country		Country Share		Spend/kid	Kids Population	% to 15+ yrs
	2010	2009	2010	2009	2010(\$)	2010 (million)	2010
1	1	United States	26.3%	27.0%	\$284	62.4	19%
2	2	Japan	7.5%	7.3%	\$312	16.9	16%
3	3	China	6.7%	6.2%	\$23	238.3	2%
4	4	United Kingdom	5.4%	5.4%	\$365	10.8	12%
5	5	France	4.9%	5.3%	\$307	12.0	10%
6	6	Germany	4.0%	4.3%	\$247	11.0	19%
7	7	Brazil	3.9%	3.5%	\$59	53.3	4%
8	9	Australia	2.8%	2.4%	\$486	4.0	17%
9	8	India	2.7%	2.6%	\$6	352.8	0%
10	10	Canada	2.5%	2.4%	\$317	5.4	17%



Behind Every Business Decision

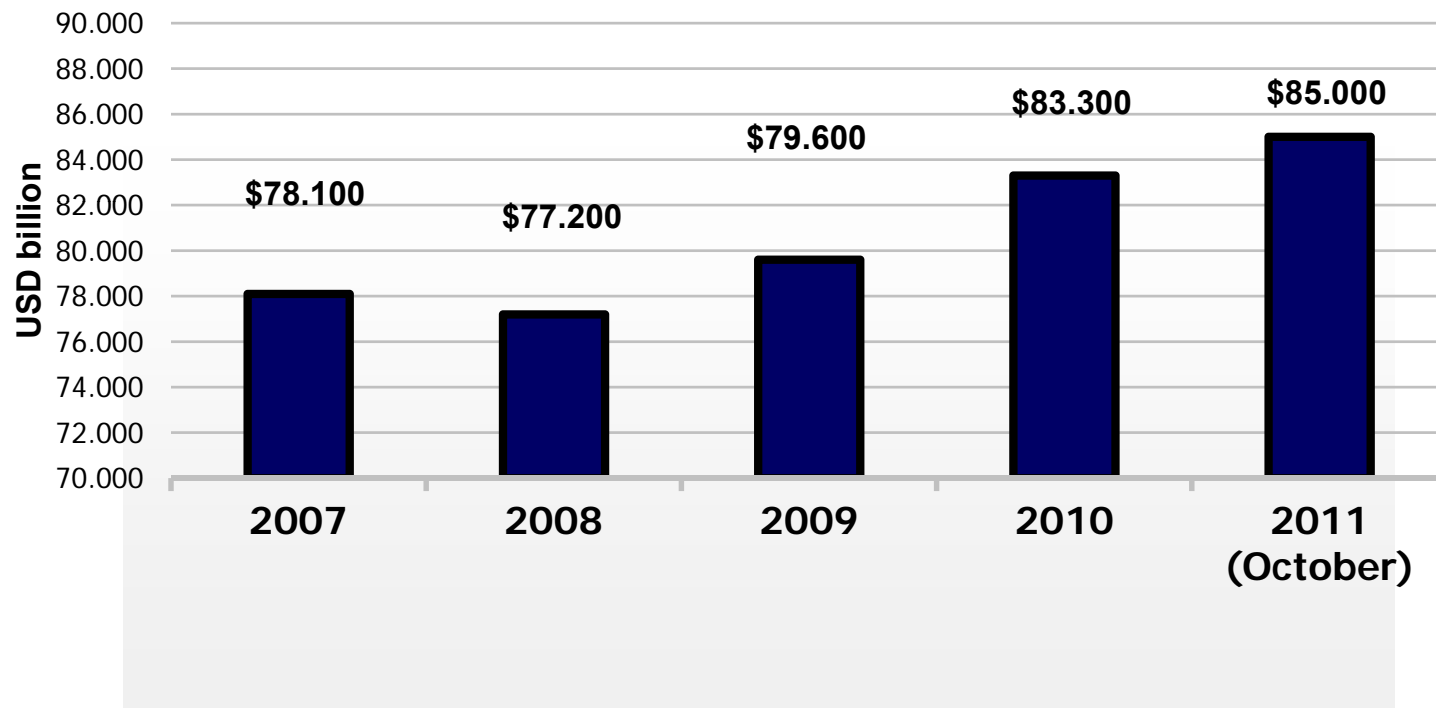


→ Indicates the presence of a tracking service from NPD

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Best Estimate of 2011 (current)

World Toy Market (billion \$)



Current expectation of mixed performance in Europe, lackluster sales in U.S. balanced by continued growth from developing countries –resulting in a 2% increase.



Danke

どうもありがとうございます

Gracias

Obrigado

Merci

Tak

Grazie

Thank You

Tack

Dziękuję

谢谢

どうもありがとうございます

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