

# France Toy Market – Review of 2021

Prepared for Licensing International France

20th May, 2022

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# Agenda

**1** Toys Market Overview

**2** Licensed Performance

**3** 2022 perspectives



# European Toy Sales: €17B in 2021

**+3%**

**Value**

+6% vs. 2019

**+2%**

**Volume**

-3% vs. 2019

**+1%**

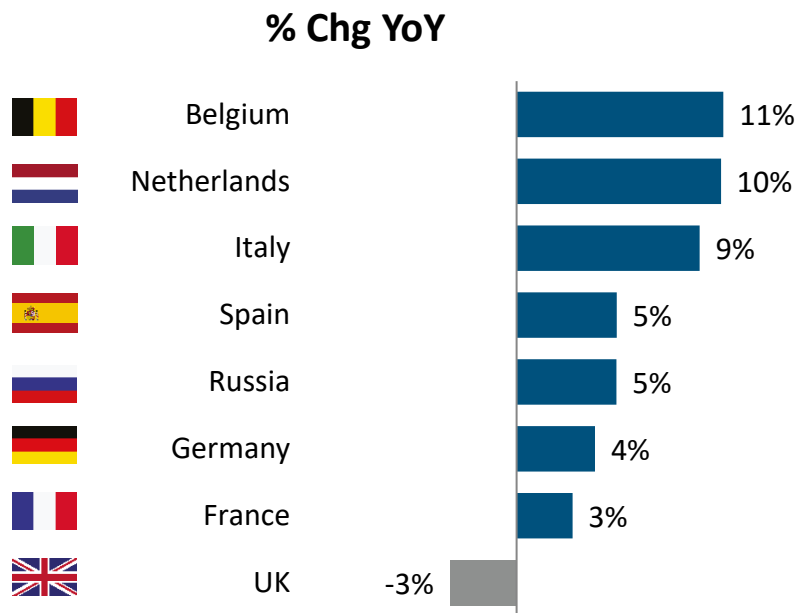
**Price**

+9% vs. 2019

*Source: The NPD Group | Retail Tracking Service Projected | EU8 | 2021 vs. 20*

# All Countries up YoY Except for the UK

Spain slower to recover 2019 level... Germany #1



## 21 vs. '19

Country	21 vs. '19
Belgium	14%
Netherlands	28%
Italy	2%
Spain	-2%
Russia	1%
Germany	15%
France	3%
UK	2%

**Global (G13)**

**+9% YoY**

**+21% vs. '19**

**U.S.**

**+13% YoY**

**80% of global gains**

Source: The NPD Group | Retail Tracking Service Projected | EU8 | 2021 vs. 20



# FRANCE TOYS MARKET & ENVIRONMENT

# 2021: record year

The market reached €3,7Bn sales : never seen before !

+2,9 %

In value

+3,3% vs. 2019

+5,1 %

In volume

-2,2 %

Average Price

Source: The NPD Group | Retail Tracking Service | FR | 2021





# LET'S FOCUS ON THE SEASON

- KEY FACTS -



# Despite tensions on supply and the pandemic

+1%

SEASON (OCT-DEC)

January-september +4%

53%

SEASON (OCT-DEC)

53% of annual turnover

30%

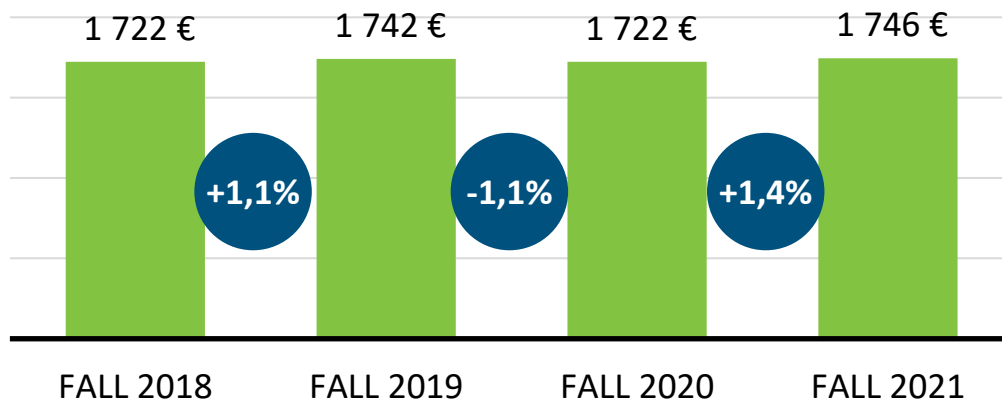
DECEMBER

30% of annual turnover  
-5% vs. 2020

Source: The NPD Group | Retail Tracking Service | FR | 2021

# A season that barely reached prepandemic level: +0,2% vs 2019

FALL - France Toy Market – Sales (€M)



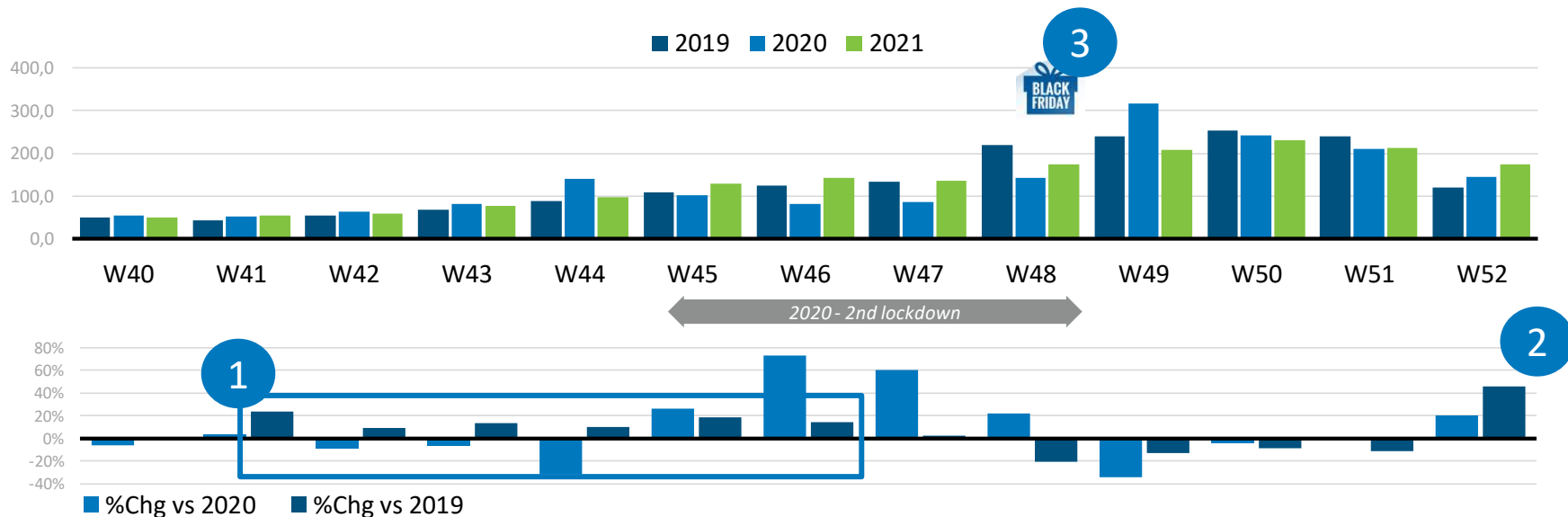
Source: The NPD Group | Retail Tracking Service | France | Fall 2021



# Anticipation & last-minute purchases

Sales down beginning of Dec. + Black Friday far from historical performance

Toy Market – FALL Weekly sales

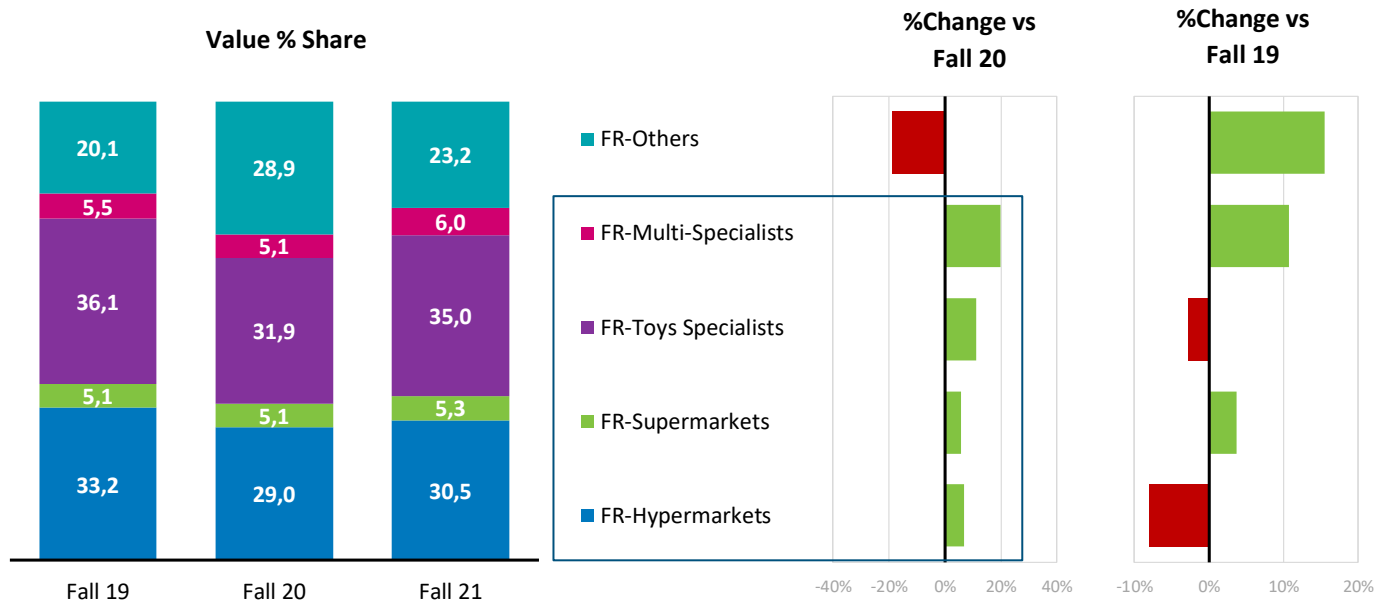


\* in 2020, due to the 2nd lockdown and store closures. Black Friday week has been moved to W49.

Source: The NPD Group | Retail Tracking Service | France | Fall 2021

# Channel Dynamics

Bricks & Mortars benefited from reopening  
Others declined vs Fall 20 but above pre-Covid level

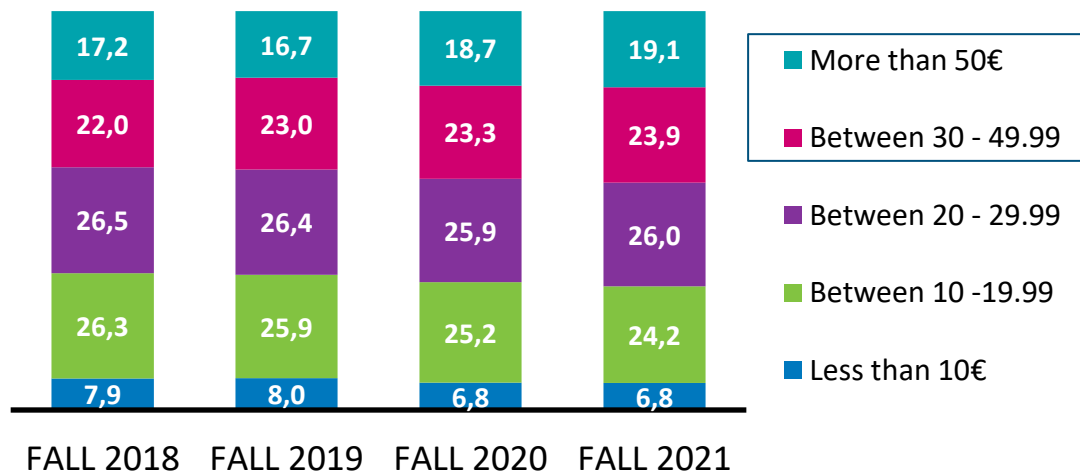


Source: The NPD Group | Retail Tracking Service | France | Fall 2021

# Toys (>30€) more and more popular with consumers

Over 43% sold at >30€ or +4 points vs 2018

FR Toy Market - Price Brackets Share (€%)



Source: The NPD Group | Retail Tracking Service | France | Fall 2021



# 2021 season confirms the return of the collection

Building Sets are also still very popular!

## Top Gaining Subsegments in €M

**+58%**

**Strategic Trade  
Card Games**



**+19%**

**Non-Powered  
Vehicles**



**+5%**

**Building  
Sets**



**+17%**

**Action Figures/ Acc. &  
Role Play**



**+2%**

**Preschool Toys**



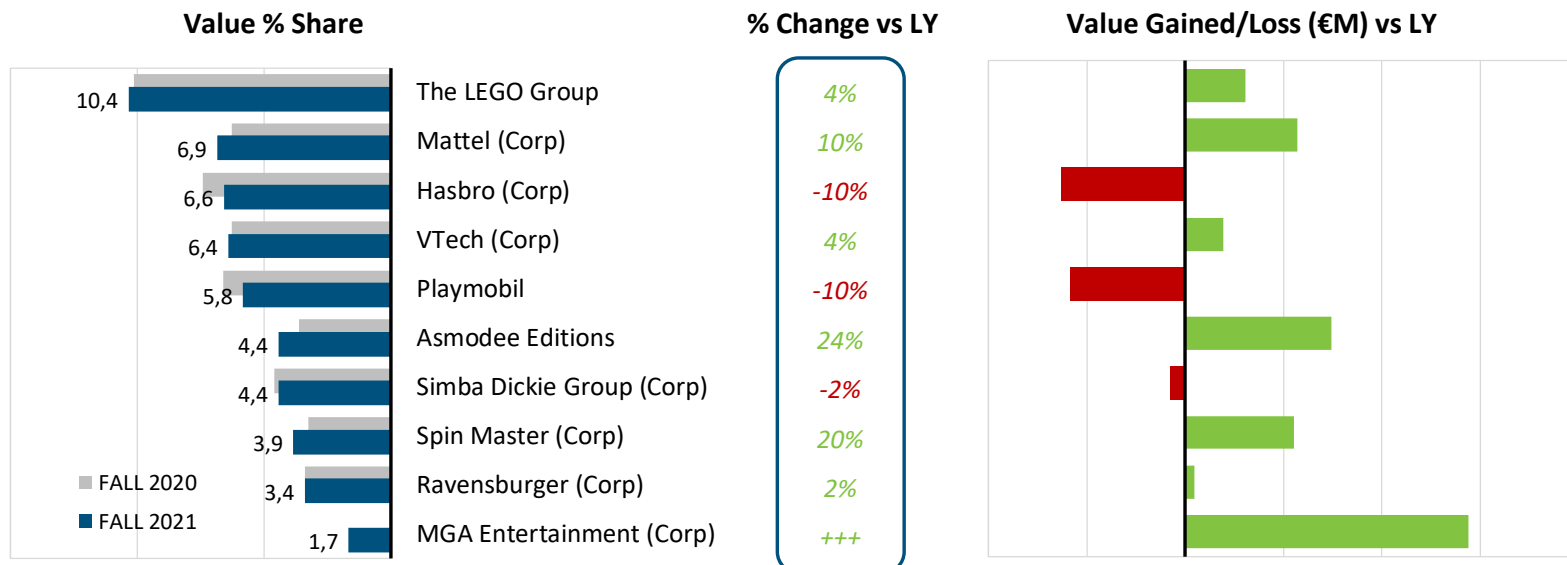
Source: The NPD Group | Retail Tracking Service | France | Fall 2021



# LEGO confirms its leadership position.

The fight for the 2<sup>nd</sup> place was strong : Hasbro moves up to 3rd place, overtaken by Mattel

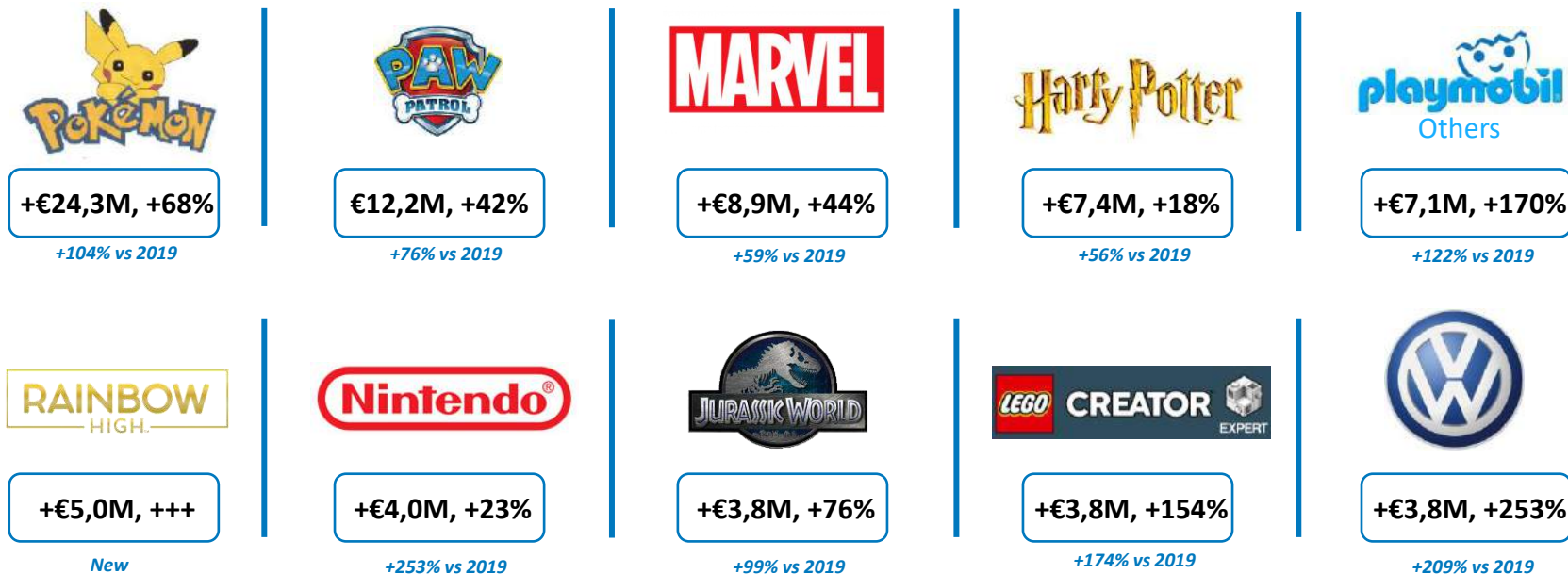
## Top 10 Corp. Manufacturers - Total Toys



Source: The NPD Group | Retail Tracking Service | France | Fall 2021

# Top Gaining Properties added 80M€ to the total market.

Pokémon by far the biggest contributor to growth during Fall 2021



Source: The NPD Group | Retail Tracking Service | France | Fall 2021













# Ma Fabrique à Histoire once again at the top

9 items >50€ | only 2 Fall novelties

## Total Toys

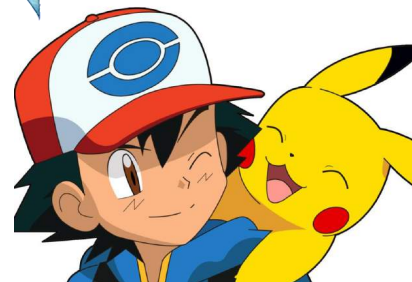
Top 20 items

3 Months (Oct'21 - Dec'21)

	Item Description	Manufacturer	Brand
	1 Ma Fabrique A Histoires	Lunii	Not Specified
	2 KidiCom Advance	VTech	KidiCom/KidiBuzz
	3 Kidizoom Duo DX	VTech	Kidi...
	4 Furreal Friends Cubby The Curious Bear	Hasbro Toys	Furreal Friends
	5 Barbie 3 In 1 Dreamcamper Vehicle And Accessories	Mattel	Barbie
	6 Hot Wheels City Vs Robo Beasts Ultimate Garage	Mattel	Hot Wheels
	7 Baby Alive Baby Grows Up Asst	Hasbro Toys	Baby Alive
	8 Pokemon Battle Academy Game	Pokemon	Pokemon
	9 YCOO Robots Kombat Twin Pack	Silverlit Toys	YCOO
	10 Kidi...Secret Safe Diary Light Show	VTech	Kidi...
	11 Pokemon Celebrations V Box Lance Charizard	Pokemon	Pokemon
	12 Barbie Color Reveal Doll With 7 Surprises Asst	Mattel	Barbie
	13 Barbie Fashionistas Ultimate Closet	Mattel	Barbie
	14 Pokemon Starter Kit Rayquaza And Bruyverne 2021	Pokemon	Pokemon
	15 Kidizoom Smart Watch DX2	VTech	Kidi...
	16 Operation	Hasbro Gaming	Operation
	17 Disney Frozen II Fashion Doll And Nokk Figure	Hasbro Toys	Not Specified
	18 Barbie Dreamtopia Twist N Style Princess Hairstyling Doll	Mattel	Barbie
	19 Paw Patrol Fig Vehicule	Spin Master	Paw Patrol
	20 Purse Pets Asst	Spin Master	Purse Pets

Barbie

Disney  
FROZEN



A woman with curly hair is seated at a wooden table in what appears to be a cafe or office setting, working on a silver laptop. She is wearing a white long-sleeved shirt and a watch on her left wrist. The image is overlaid with a semi-transparent blue filter. The text "LICENSED OVERVIEW" is centered in white, bold, sans-serif capital letters.

# LICENSED OVERVIEW

# Licensed Market – In a nutshell

**764 m€**  
**+8.5 %**

**42 mU**  
**+9 %**

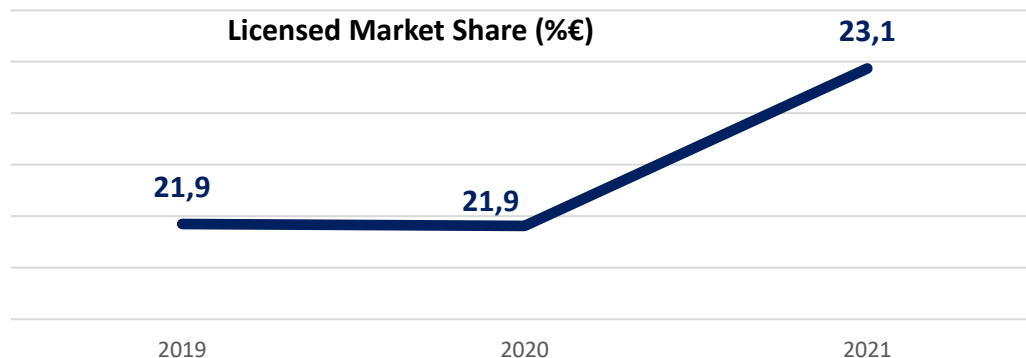
Avg Price  
**18.5€**  
**flat**



# Licensed Market

## +8.5%

vs +1.2% (non Licensed)

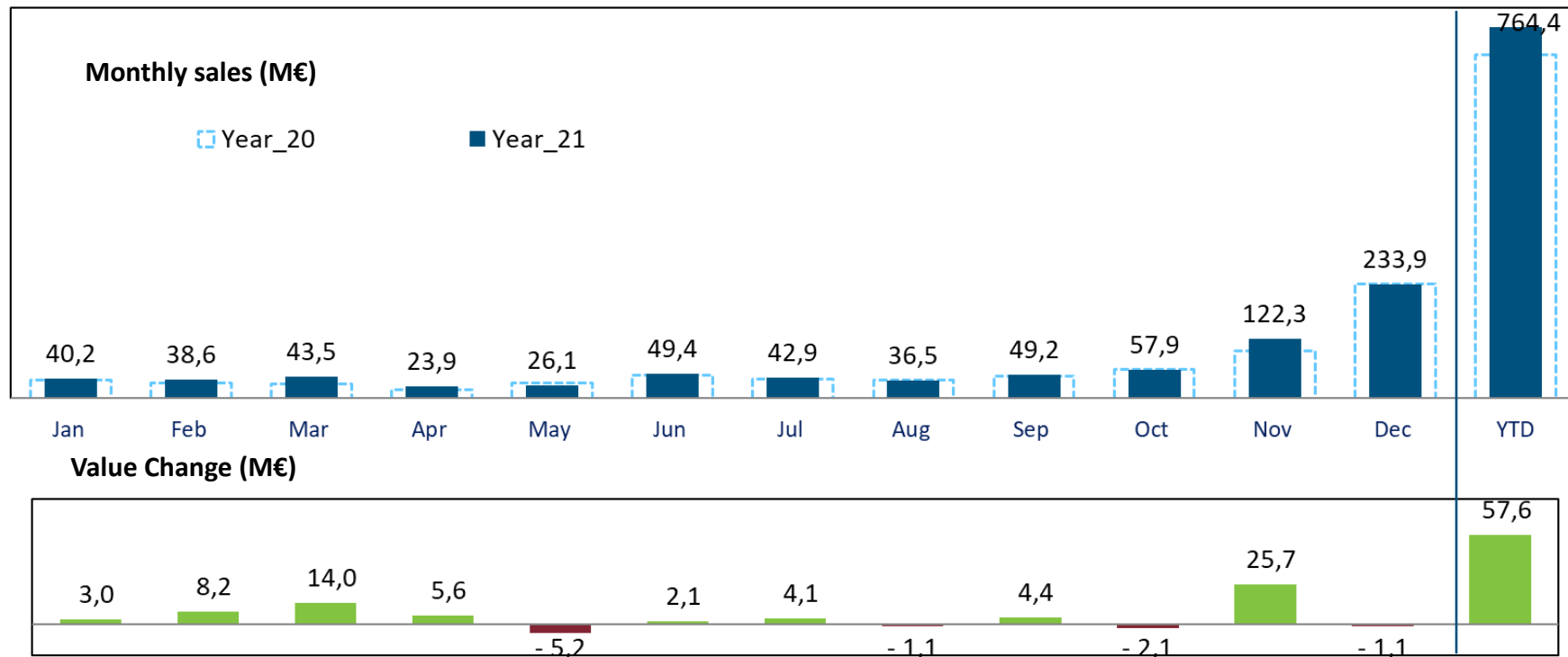


Source: The NPD Group | Retail Tracking Service | France | FY 2021



# Monthly Sales\_FY 2021

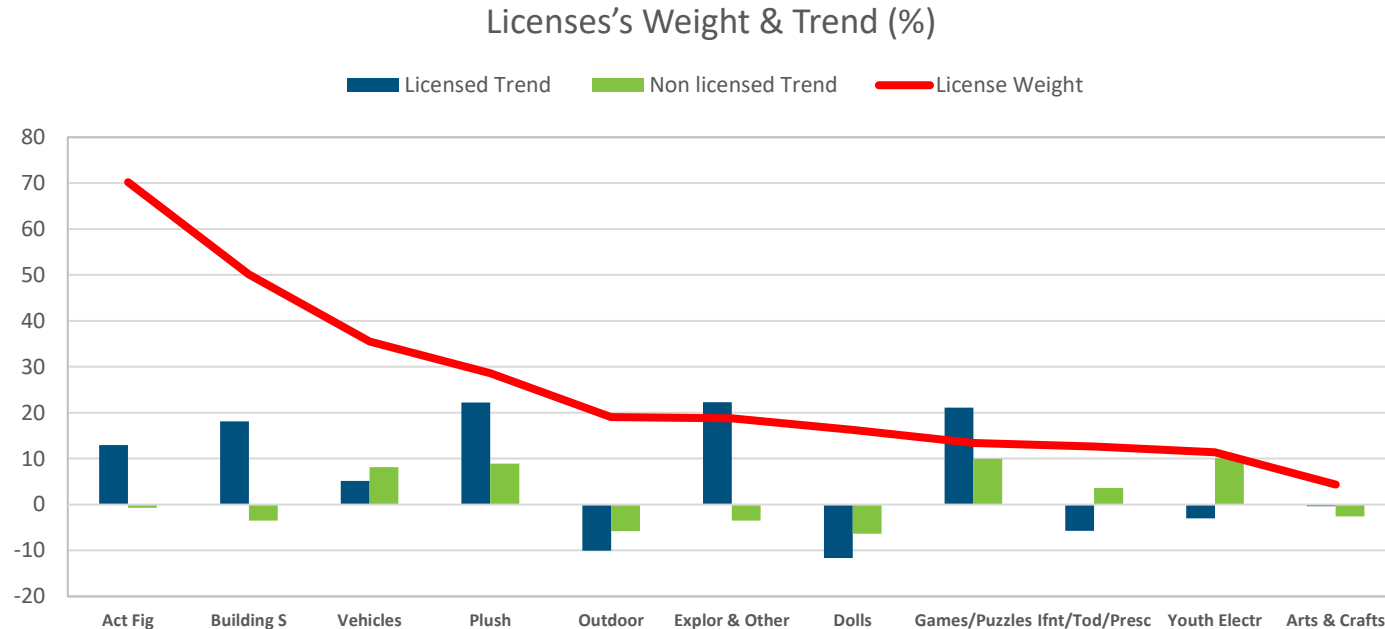
Toys consumers anticipated their sales in November (+€26M)



Source : NPD Group | Retail Tracking Data | France | 2021

# Licenses – Super Categories

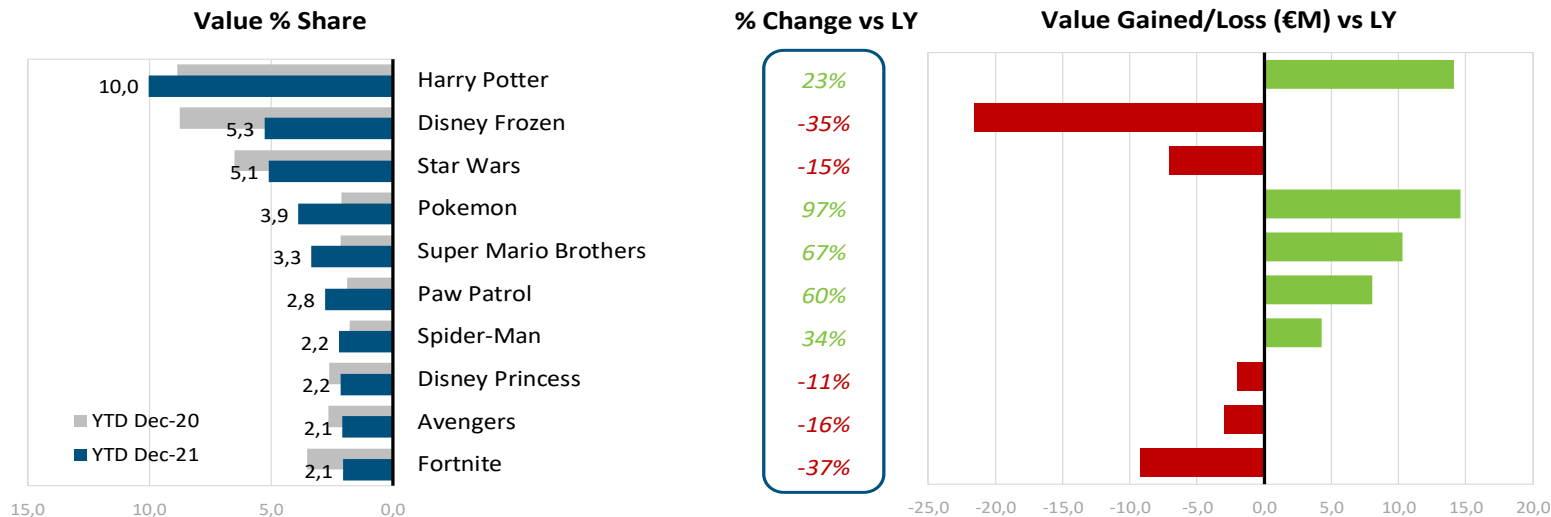
Overall, licenses performed better than non-licensed toys in almost all the categories



# TOP Licenses\_FY 2021

## Half of top 10 licenses displayed growth

Top 10 Licenses - Total Toys



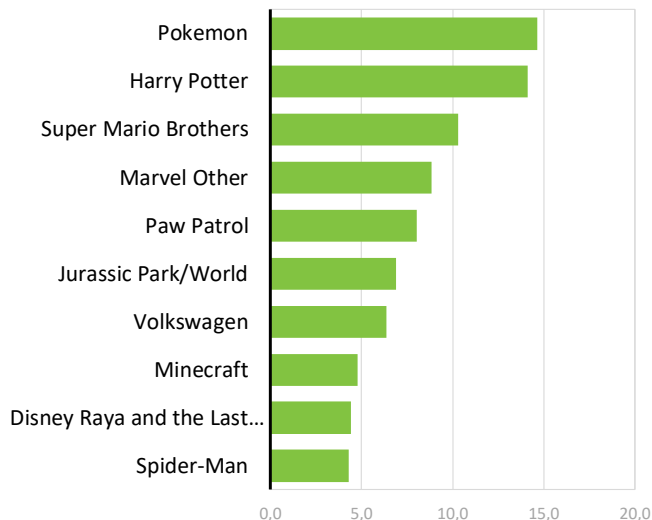
Source: The NPD Group | Retail Tracking Service | France | 2021

# Top and Flop licenses\_FY 2021

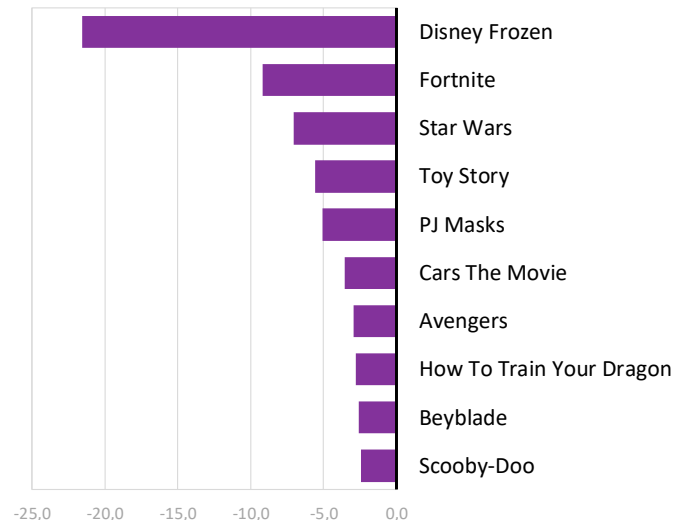
Top 10 leaders cumulated €83M additional sales

## Top & Flop Licenses - Total Toys

Top 10 Licenses - ranked on sales gains (€M)



Flop 10 Licenses - ranked on sales losses (€M)

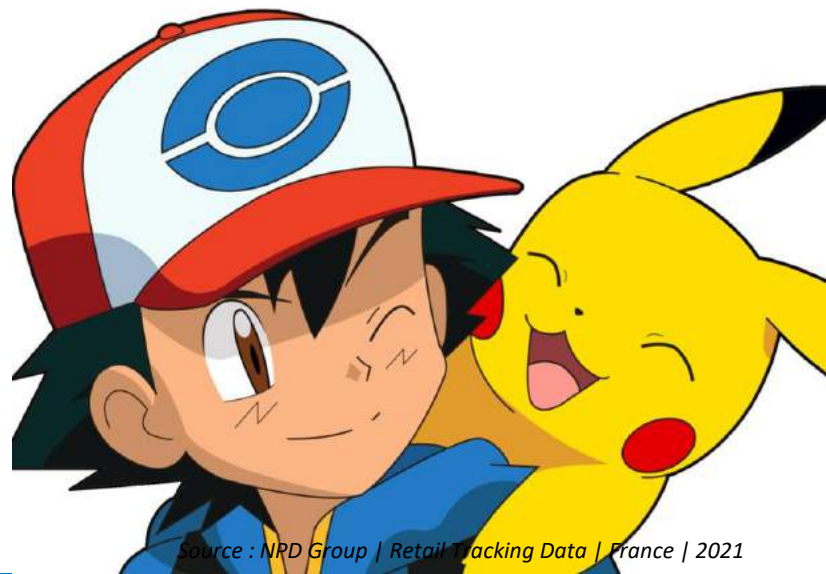
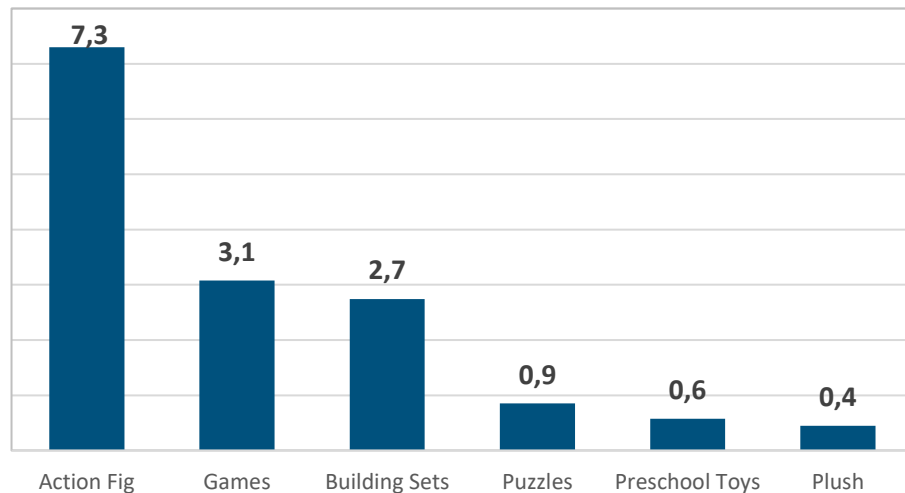


Source : NPD Group | Retail Tracking Data | France | 2021

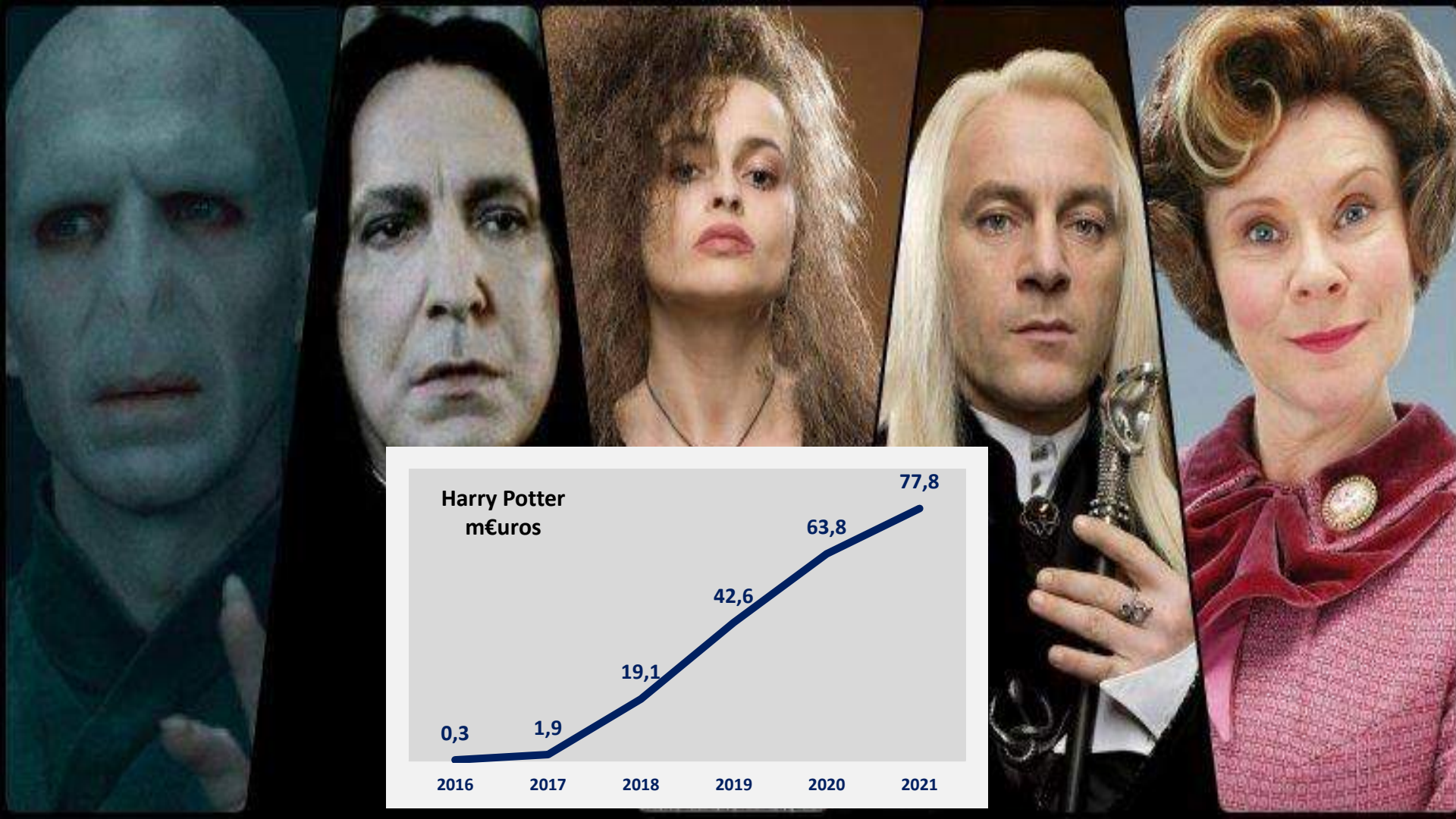
# Pokemon Top 1 gains contributor in the licenses

Action Figures contributed to 50% of the total gains

Segments: top contributors (m€)



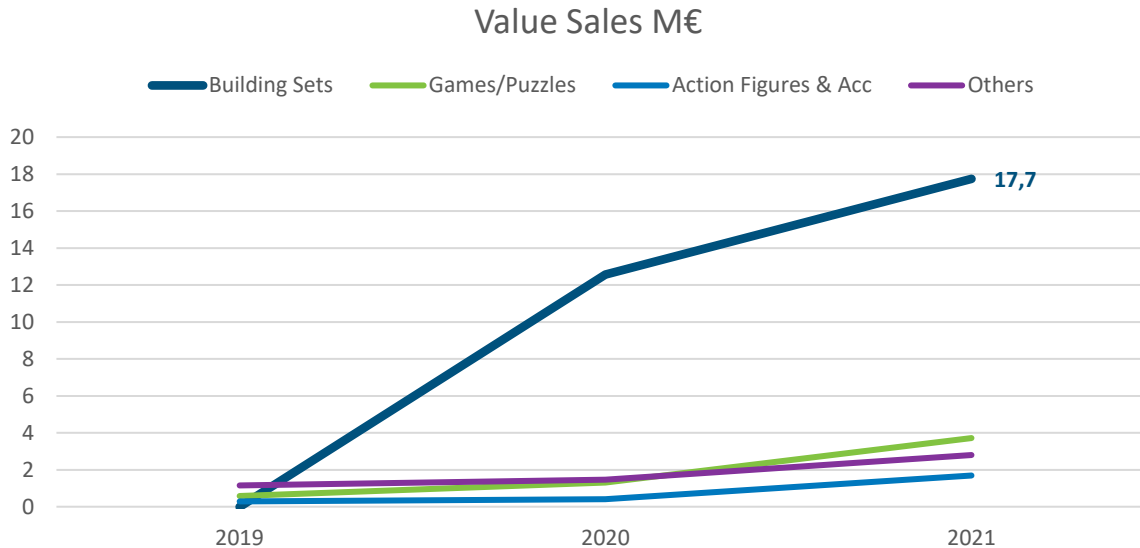
Source : NPD Group | Retail Tracking Data | France | 2021





# Super Mario

Building Sets 68% of total sales and 50% of gains



Source : NPD Group | Retail Tracking Data | France | 2021



**39%**

of sales are linked to movies

**295M @ +€10M**



**Video Games licenses  
represented about 13% of sales  
and grew by  
+€23M**

*Source: The NPD Group | Retail Tracking Service | France | 2021*



# Top 10 licensors\_FY 2021

Top 10 Licensed represented 2/3 of licensed sales and grew 7% while the ROM of licensed business recorded 2 digit growth

## Value sales 2021



VOLKSWAGEN  
GROUP



Source: The NPD Group | Retail Tracking Service | France | 2021

# TOP 3 Licensors by channel\_FY 2021

Disney #1 and Warner #2 in all channels

Ranked by value

## FOOD



Disney



Nintendo

## SPECIALISTS



Disney



NBCUniversal

New

SUPERMARKETS

Disney



## MULTI-SPECIALISTS

Disney

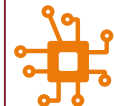


## OTHERS

Disney



VOLKSWAGEN  
GROUP

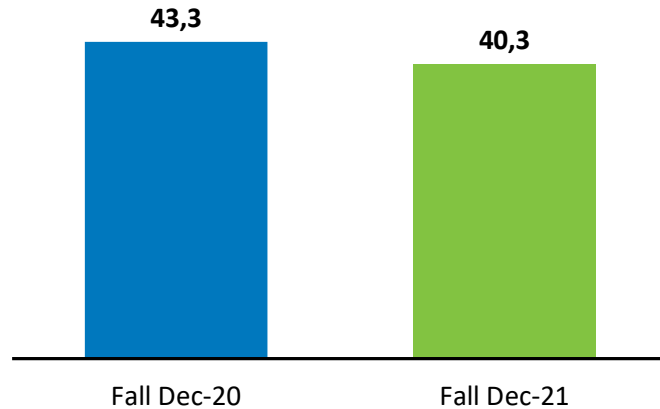


Source: The NPD Group | Retail Tracking Service | France | 2021

# New items contribution\_Fall 2021

Innovation lost ground (-3 points vs LY)

Novelties Market Share (€%)



In total market : novelties represented 25,4% of the sales



Source: The NPD Group | Retail Tracking Service | France | 2021



# TOP 10 New Items Ranked on Value\_Fall 2021



**Beyblade Burst Surge Speed  
Storm Asst**  
1,3 M€



**Star Wars Luke Skywalker's  
X-Wing Fighter**  
1,3 M€



**Minecraft The Pig House**  
1,1 M€



**Spirit Untamed Doll And  
Horse Asst**  
1,1 M€



**Black & Decker Bricolo  
Center**  
1,0 M€



**Star Wars Imperial Tie Fighter**  
1,0 M€



**Harry Potter Hogwarts Moment  
Transfiguration Class Set**  
1,0 M€



**Harry Potter Hogwarts  
Moment Potions Class**  
937 K€



**Beyblade Burst Surge  
Speed Storm Asst**  
728 K€



**Star Wars The Mandalorian  
Trouble On Tatooine**  
712 K€

Source : NPD Group | Retail Tracking Data | France | 2021

# 2021 License Market

+8%

Licensed reached €764M value sales boosted by volumes (+9%). Licensed grew faster (+8%) than non-licensed (+1%)

13%

Video Games licenses represented about 13% of sales and grew by +€23M

54%

Xmas season represented 54% of sales. But Prefall (+€35M) was more dynamic thanks to the period from February to April

68%

Top 10 Licensors represented 68% of sales and grew by 8% driven by WBCP, NBCU, Nintendo, Pokemon, Spin Master

23%

Licensed reached a new gap and represented 23% of the total market sales in 2021

5/10

5 out of the top best licenses grew through new movies and video games

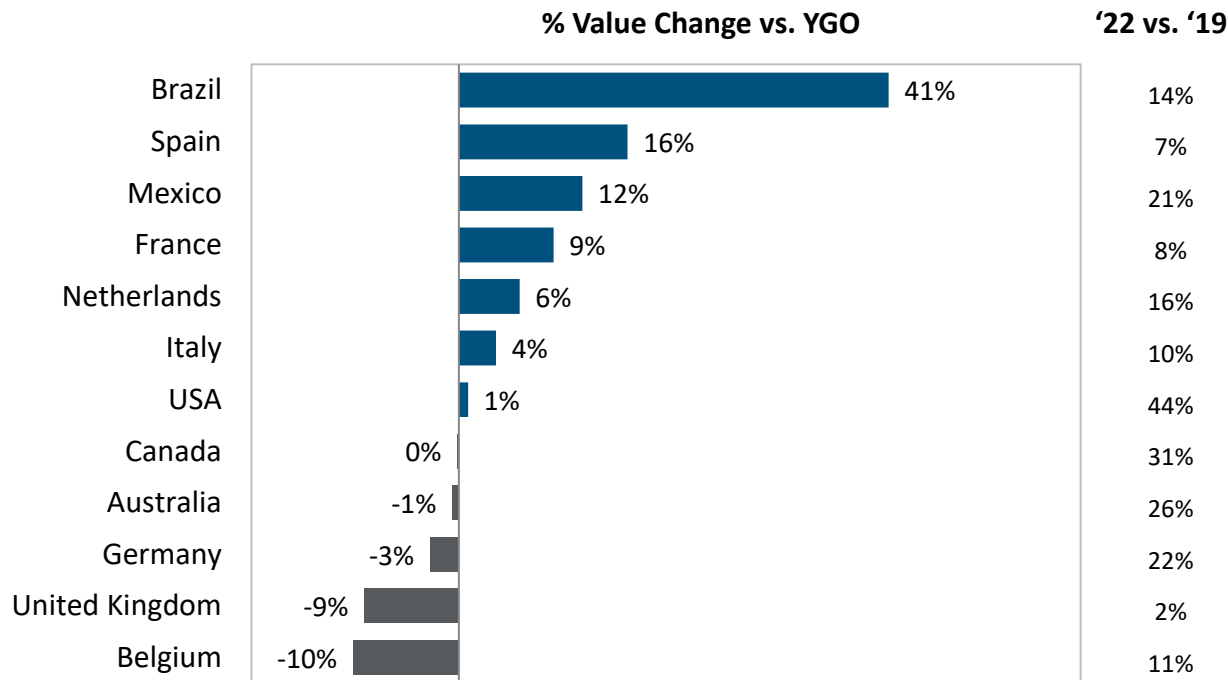
Source : NPD Group | Retail Tracking Data | France | 2021

A young boy with dark hair, wearing a green and white checkered shirt, is sitting on a purple cushion and reading a large, colorful book. He is looking down at the pages with concentration. In the background, a blue dinosaur figurine is visible on a shelf. To the left, a row of books is standing upright on a shelf. The entire image is overlaid with a semi-transparent blue band across the middle, which contains the text "2022 PERSPECTIVES" in white, bold, sans-serif capital letters.

# 2022 PERSPECTIVES

# Industry Growth / Decline By Country

7/12 countries up on last year



G12

**+1.2%**

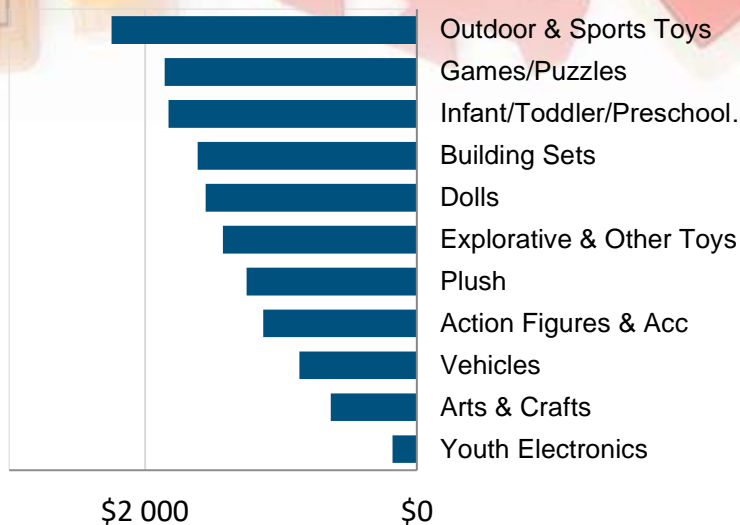
vs. YGO

**+32%** vs. 2019

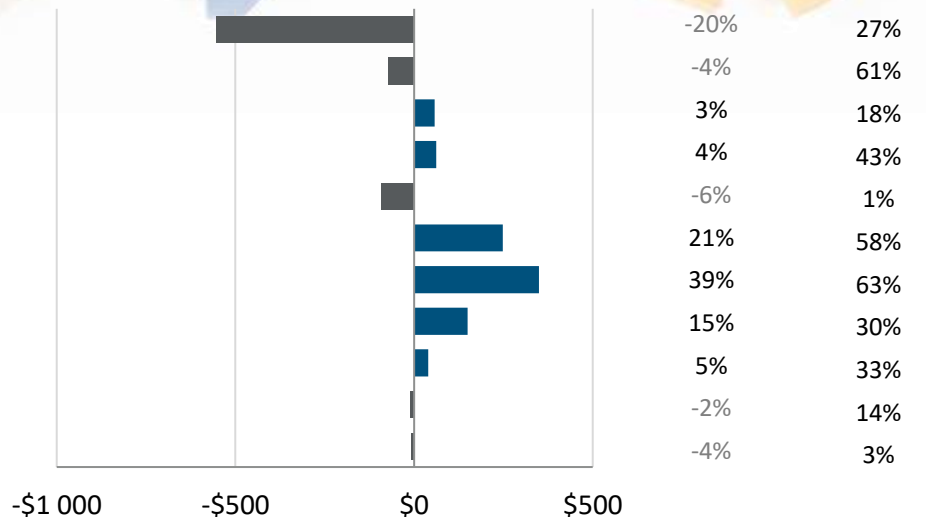
Source: The NPD Group | Retail Tracking Service | G12 \$ Sales Projected | YTD Apr 2022

# Global Performance By Super Category

5 Super Categories in decline YoY



Market Size (\$MM USD)



Loss/Gain (\$MM USD) YoY

% Chg YGO vs. 2019

Source: The NPD Group | Retail Tracking Service | G12 \$ Sales Projected | YTD Apr 2022



# 2022 Movies

## Q1

January 28

Ice Age



Walt Disney Studios

March 4

The Batman



Warner Bros.

March 11

Turning Red



Walt Disney Studios

## Q2

April 8

Sonic The Hedgehog 2



Paramount

April 15

Fantastic Beasts III



Warner Bros.

April 22

The Bad Guys



Universal

May 6

Doctor Strange



Walt Disney Studios

May 20  
DC League of Super Pets



Warner Bros.

June 10  
Jurassic World: Dominion



Universal

June 17  
Lightyear



Walt Disney Studios

## Q3

July 1

Minions: The Rise of GRU



Universal

July 8

Thor: Love and Thunder



Walt Disney Studios

September 23  
Puss In Boots: The Last Wish



Universal

## Q4

October 7

Spider-Man: Into The Spider-Verse 2



Columbia Pictures

November 4

The Flash



Warner Bros.

November 11  
Black Panther: Wakanda Forever



Walt Disney Studios

TBD

Disenchanted



Walt Disney Studios

December 16

Avatar 2



20th Century Studios



# 2022 Outlook

## Tailwind



Collection & innovation



Licences: films & VG



Viral, social media, TikTok



Kidults (12+)

## Headwind



Online vs. Store trips



Return to entertainment



Inventory, inflation  
& promos



Birth rates

## Themes



Wellness, sustainability,  
second hand



Diversity, Equity &  
Inclusion



Dinosaurs, dragons,  
knights, unicorns...



Fans & communities,  
metaverse & NFT's

2022

The year of the  
Dino



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