

NPD Group Presents The Global Toy Report

Annual 2021

Prepared for ICTI and ATA Members

May 2022

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2021 - Key Findings

The global toy market has been growing by 4.1% on average since 2016

\$104B

SIZE

The global toy market was worth \$104.2B in 2021

+4.1%

CAGR

The Compound Annual Growth Rate (CAGR) for the global toy market was 4.1% over the five year period since 2016

\$59

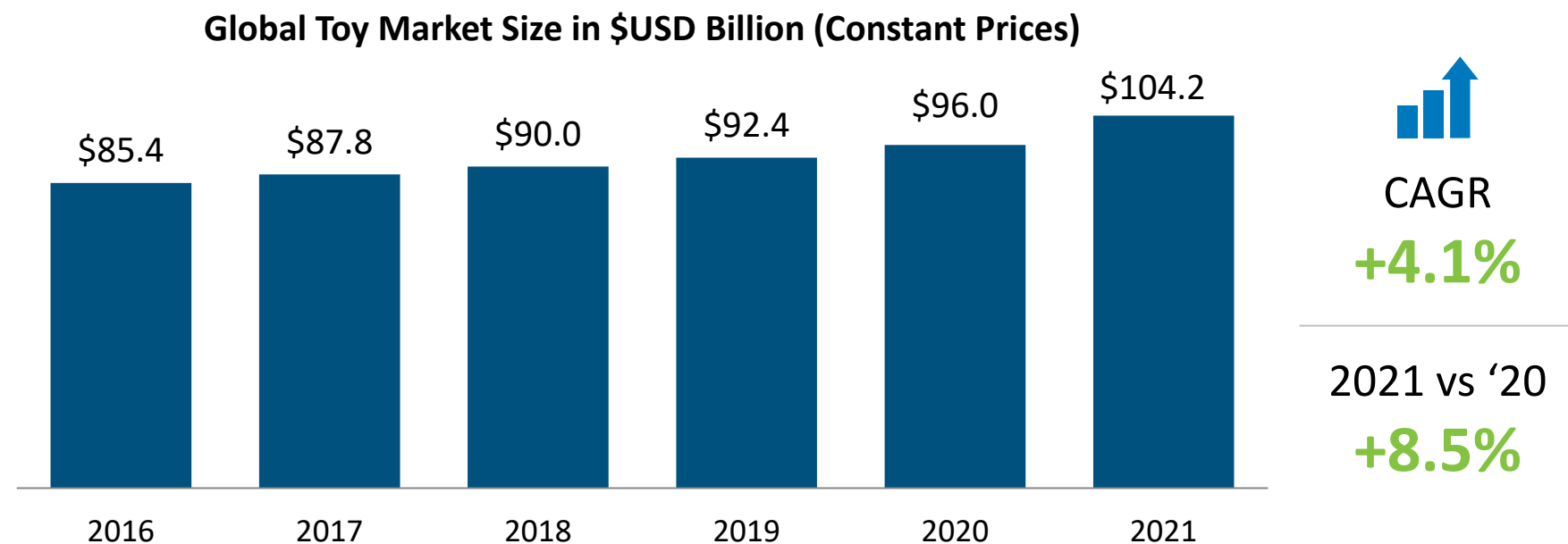
SPEND PER CHILD

The average annual spend per child (0-9 years old) was \$59 globally in 2021

Source: The NPD Group's Global Toy Market Report Annual 2021

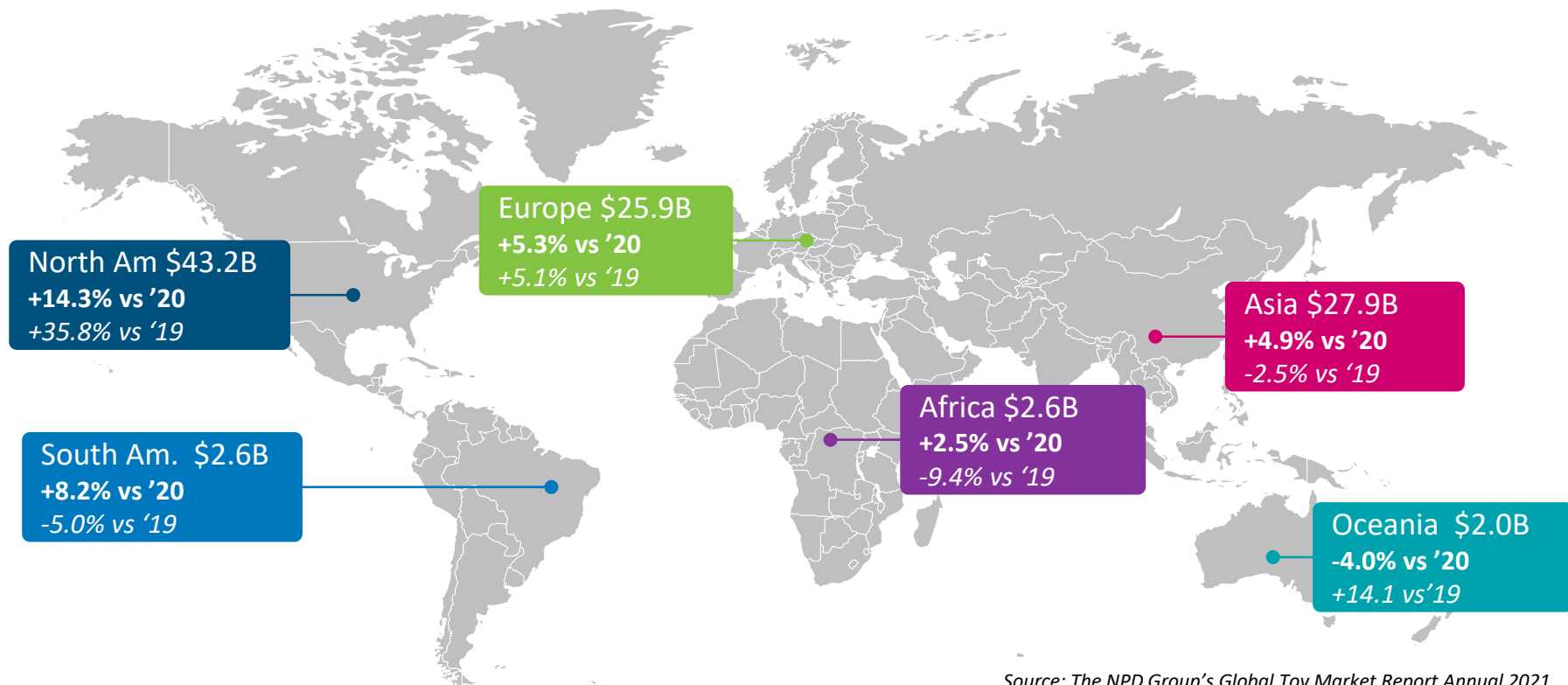
Global Market Size

The toy market grew 8.5% globally in 2021



Source: The NPD Group's Global Toy Market Report Annual 2021

Size by Region – 2021 & Pct. Change vs '20/19



Source: The NPD Group's Global Toy Market Report Annual 2021

Market Size by Region Over Time

Turnaround in 2021 as North America increases gap with other continents

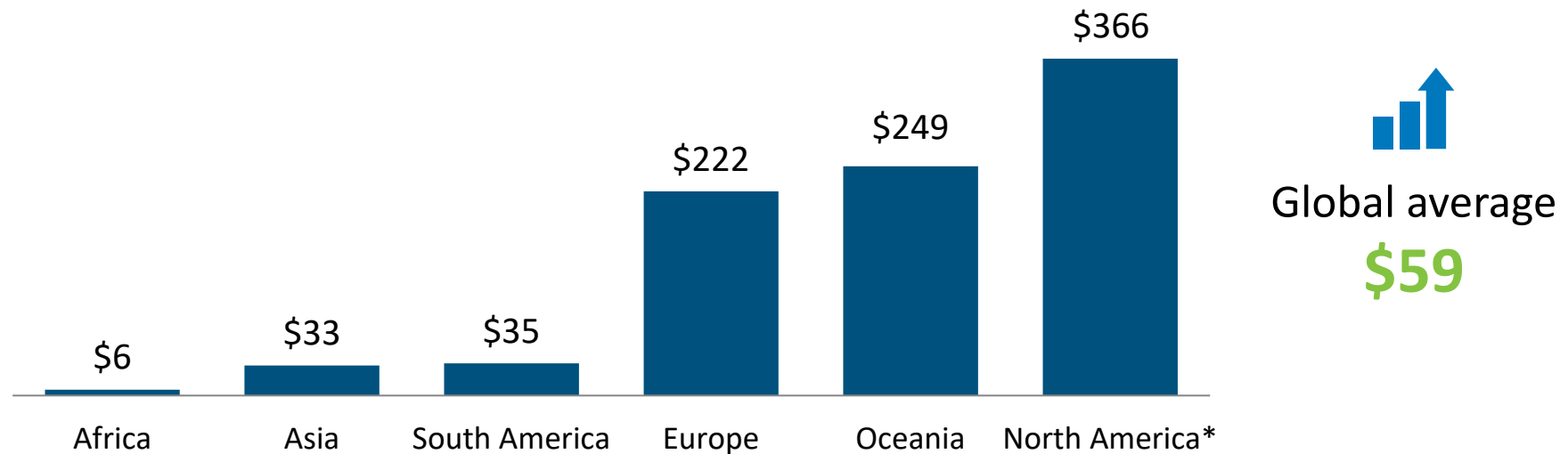
in \$USD (MM)	2016	2017	2018	2019	2020	2021	2021 v 16	2021 v 20	2021 v 19
North America	\$28,730	\$29,950	\$30,620	\$31,853	\$37,843	\$43,247	51%	14%	36%
Asia	\$25,110	\$26,189	\$27,424	\$28,612	\$26,591	\$27,897	11%	5%	-2%
Europe	\$23,866	\$24,278	\$24,536	\$24,637	\$24,588	\$25,901	9%	5%	5%
South America	\$3,133	\$2,801	\$2,846	\$2,756	\$2,421	\$2,619	-16%	8%	-5%
Africa	\$2,714	\$2,759	\$2,809	\$2,854	\$2,524	\$2,587	-5%	3%	-9%
Oceania	\$1,806	\$1,784	\$1,755	\$1,734	\$2,060	\$1,979	10%	-4%	14%
Total	\$85,357	\$87,761	\$89,990	\$92,447	\$96,027	\$104,230	22%	9%	13%

Source: The NPD Group's Global Toy Market Report Annual 2021

Annual Spend per Child per Region

North America's spend / child is 65% larger than Europe, 11X larger than Asia

Annual Spend per Child in \$USD (0-9 years)



* Includes Caribbean, Iceland, Greenland...

Source: The NPD Group's Global Toy Market Report Annual 2021

Annual Spend per Child by Region Over Time

Oceania declined in spend / child in 2021 while still up vs pre-pandemic

in \$USD (MM)	2016	2017	2018	2019	2020	2021	2021 v 16	2021 v 20	2021 v 19
North America	\$281	\$290	\$297	\$303	\$343	\$366	30%	7%	21%
Asia	\$30	\$31	\$33	\$34	\$32	\$33	8%	4%	-5%
Europe	\$224	\$225	\$224	\$222	\$213	\$222	-1%	4%	0%
Africa	\$7	\$7	\$7	\$7	\$6	\$6	-14%	0%	-13%
South America	\$41	\$37	\$38	\$37	\$32	\$35	-15%	8%	-5%
Oceania	\$241	\$237	\$232	\$227	\$265	\$249	3%	-6%	10%
Total	\$54	\$55	\$56	\$57	\$57	\$59	9%	4%	4%

Source: The NPD Group's Global Toy Market Report Annual 2021

Category Structure by NPD Country - 2021

Outdoor & Sports Toys is the largest category overall

In %	G13*	AUS
Action Figures & Acc	6.6	6.3
Arts & Crafts	4.5	4.4
Building Sets	11.4	21.0
Dolls	13.2	12.9
Games/Puzzles	12.6	8.3
Infant/Toddler/PS Toys	13.6	13.9
Youth Electronics	1.7	2.4
Outdoor & Sports Toys	16.8	13.2
Plush	5.2	5.4
Vehicles	6.6	8.0
Explorative & Other Toys	7.8	4.2

Licensed toy share
of toy sales in 2021
Australia

33%

**G13 = excludes China due to different methodology*

Source: The NPD Group Retail Tracking Service

THANK YOU

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