



EuroToys Consumer Summary January – December 2009 Market: Germany

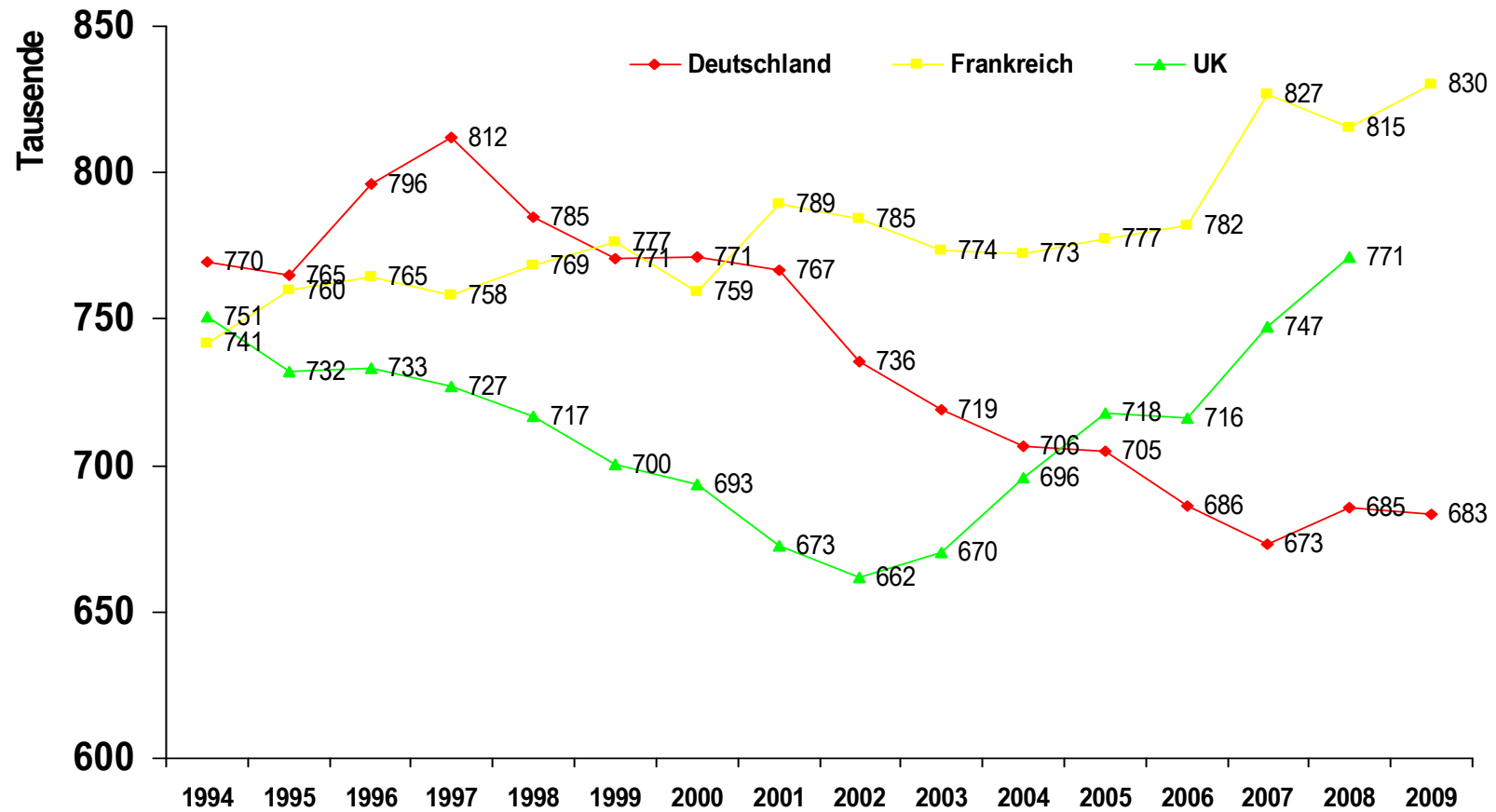




Market Overview



Number of Births in Europe

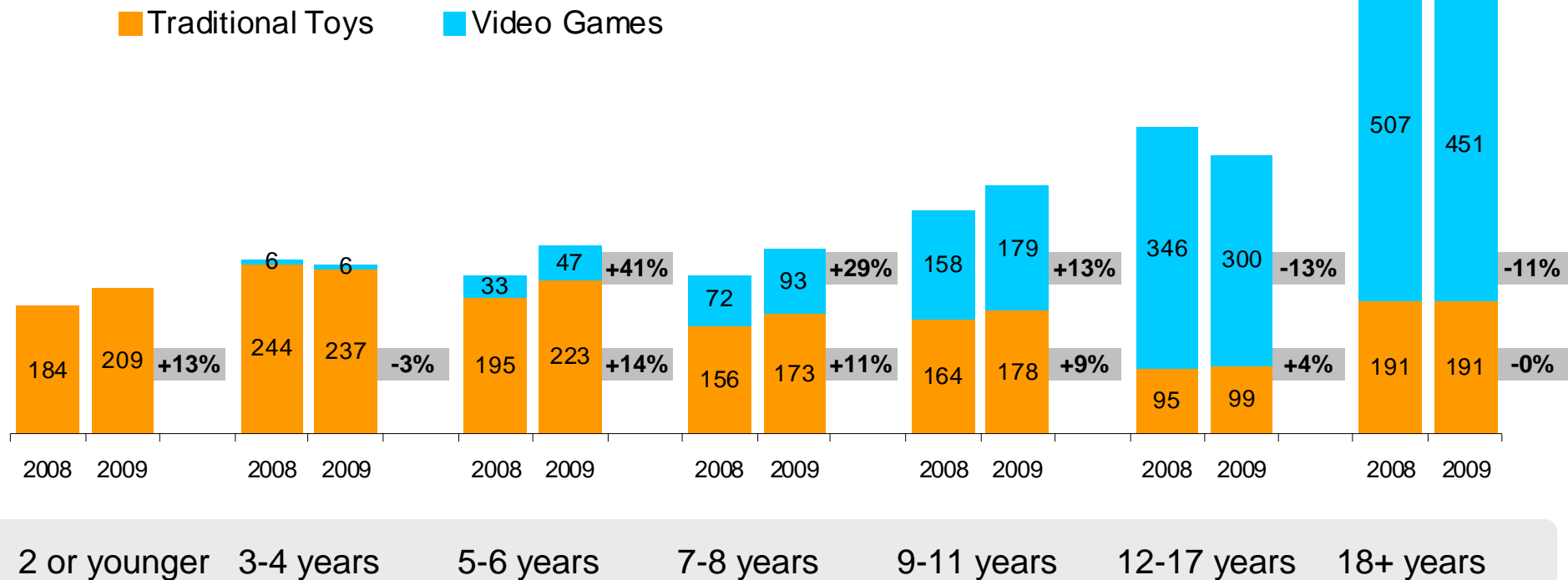




Sales Mix by Recipient Age – Male Recipients Value (€M) 2009 vs 2008

- Boys of most age groups received more toys than in 2008 while video games only grew in the younger, non-core age segments

Sales (2008-2009) in million €

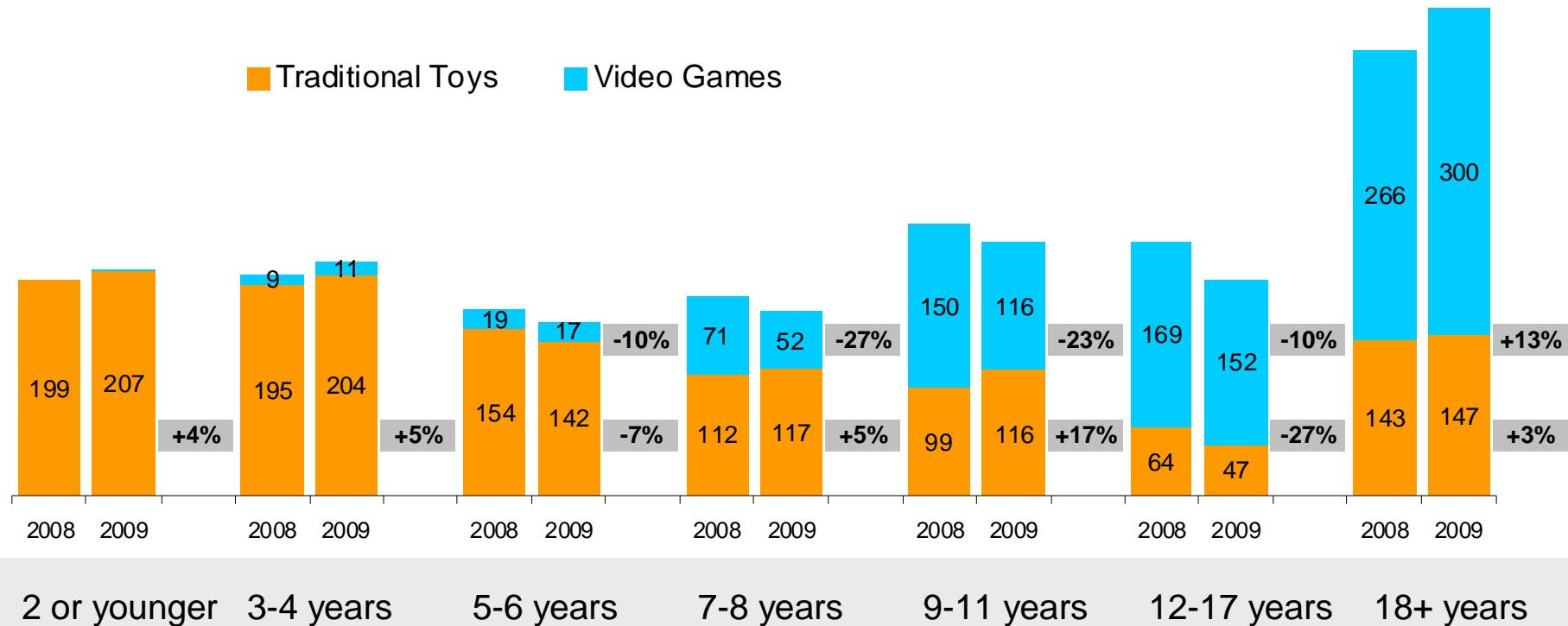




Sales Mix by Recipient Age – Female Recipients Value (€M) 2009 vs 2008

- Girls' interest in video games declined in 2009 while toy sales grew for preschoolers and tweens

Sales (2008-2009) in million €

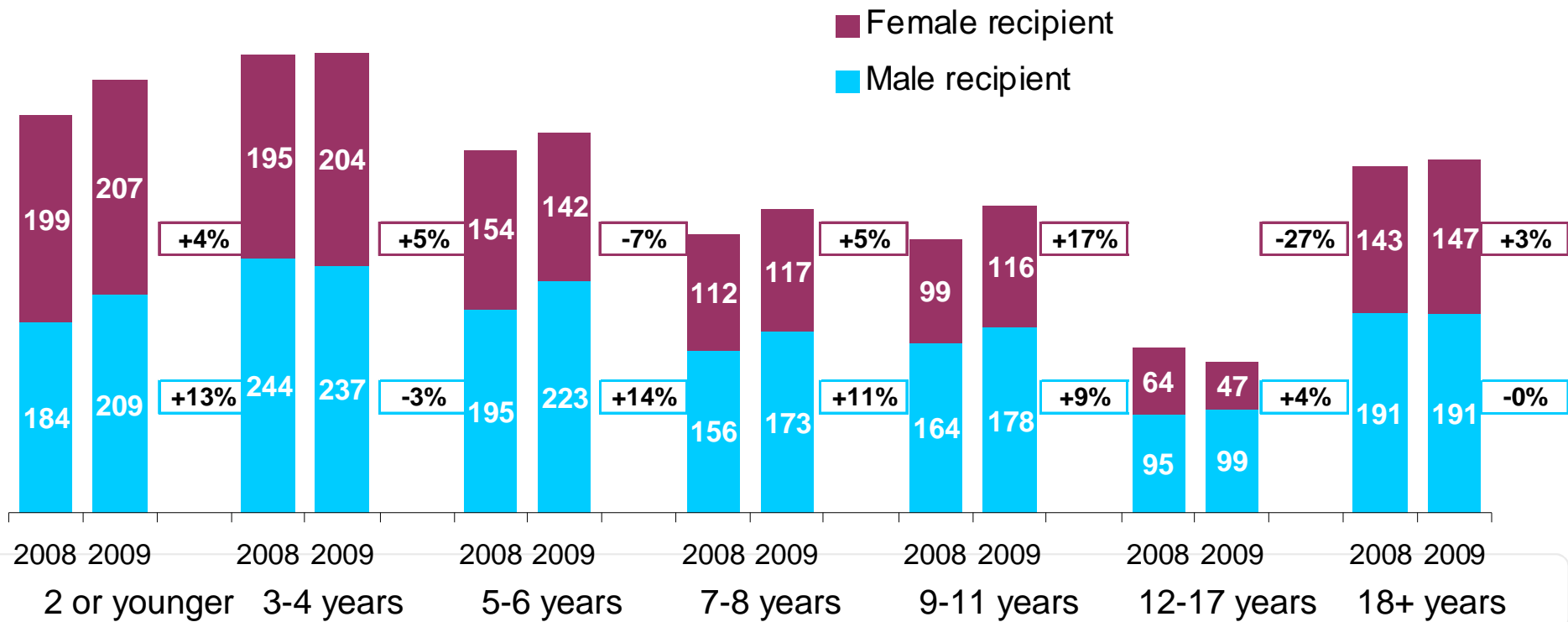




Traditional Toys sales by recipient age and gender Value (€M) 2009 vs 2008

- Starting at age 3-4 the girls' toy market lags behind boys and is less dynamic

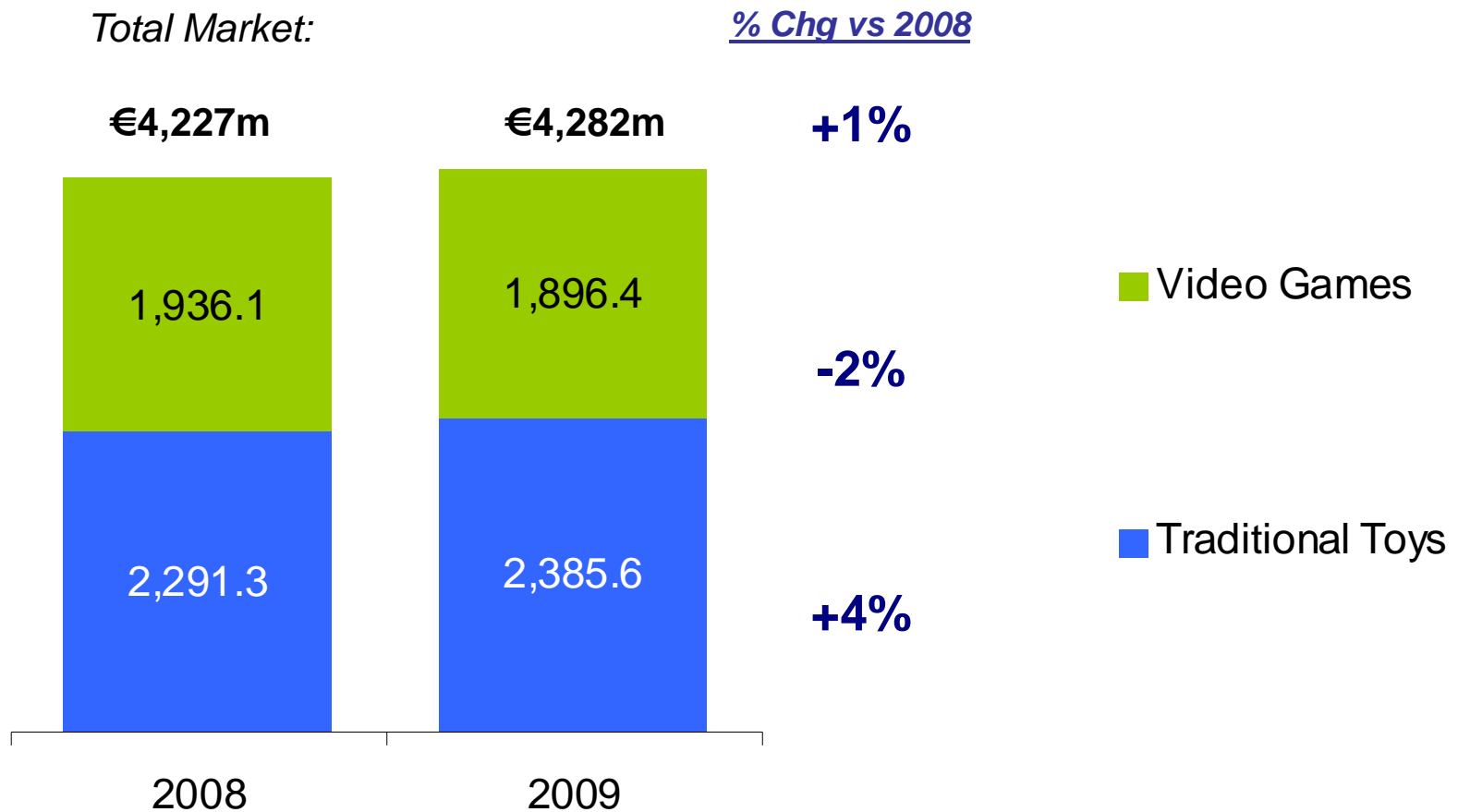
Sales (2008-2009) in million €





Total Market Value (m€) January-December 2009 vs 2008

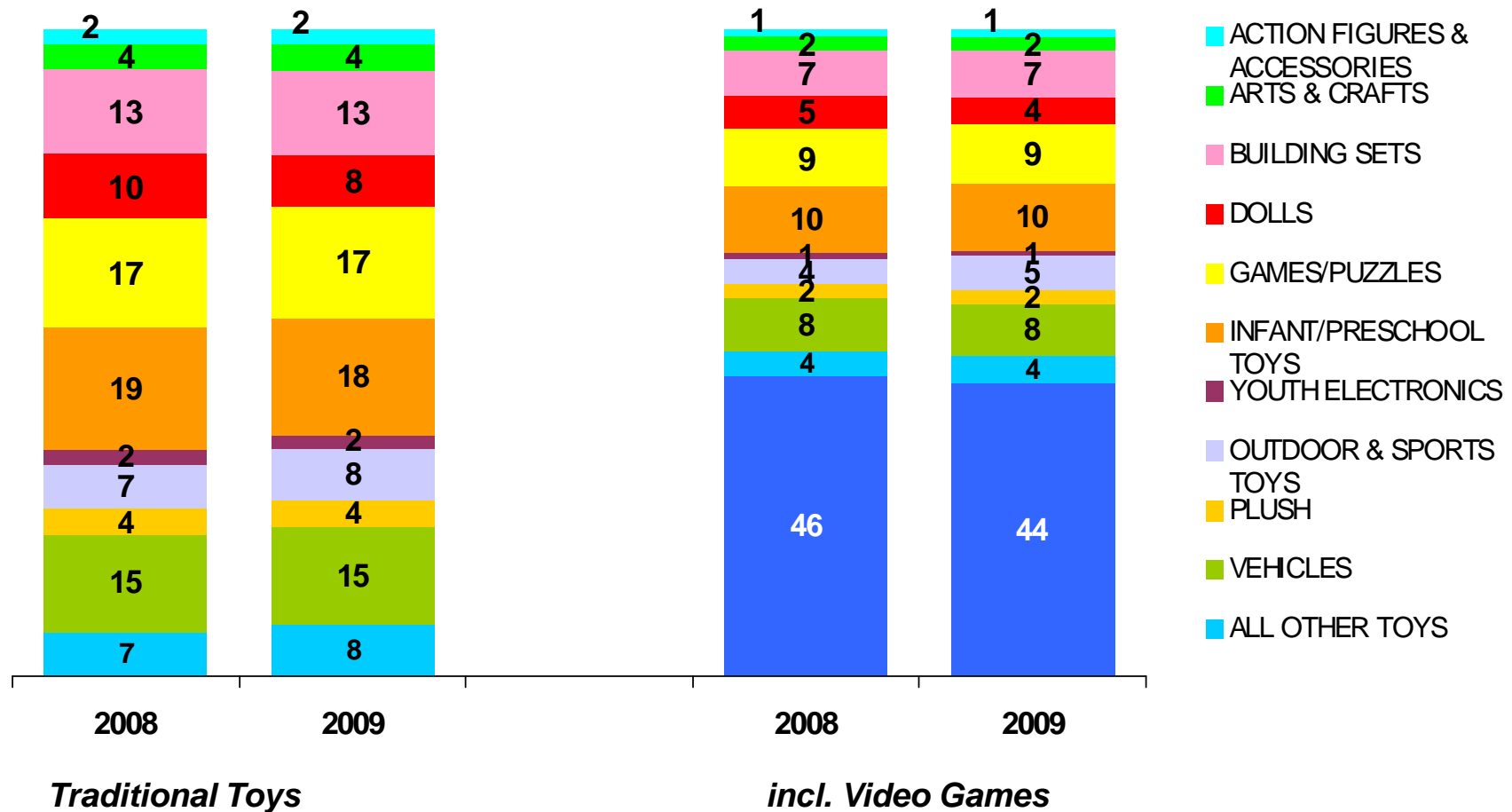
■ Video Games turned down in 2009





Distribution of sales Traditional Toys & Video Games 2009

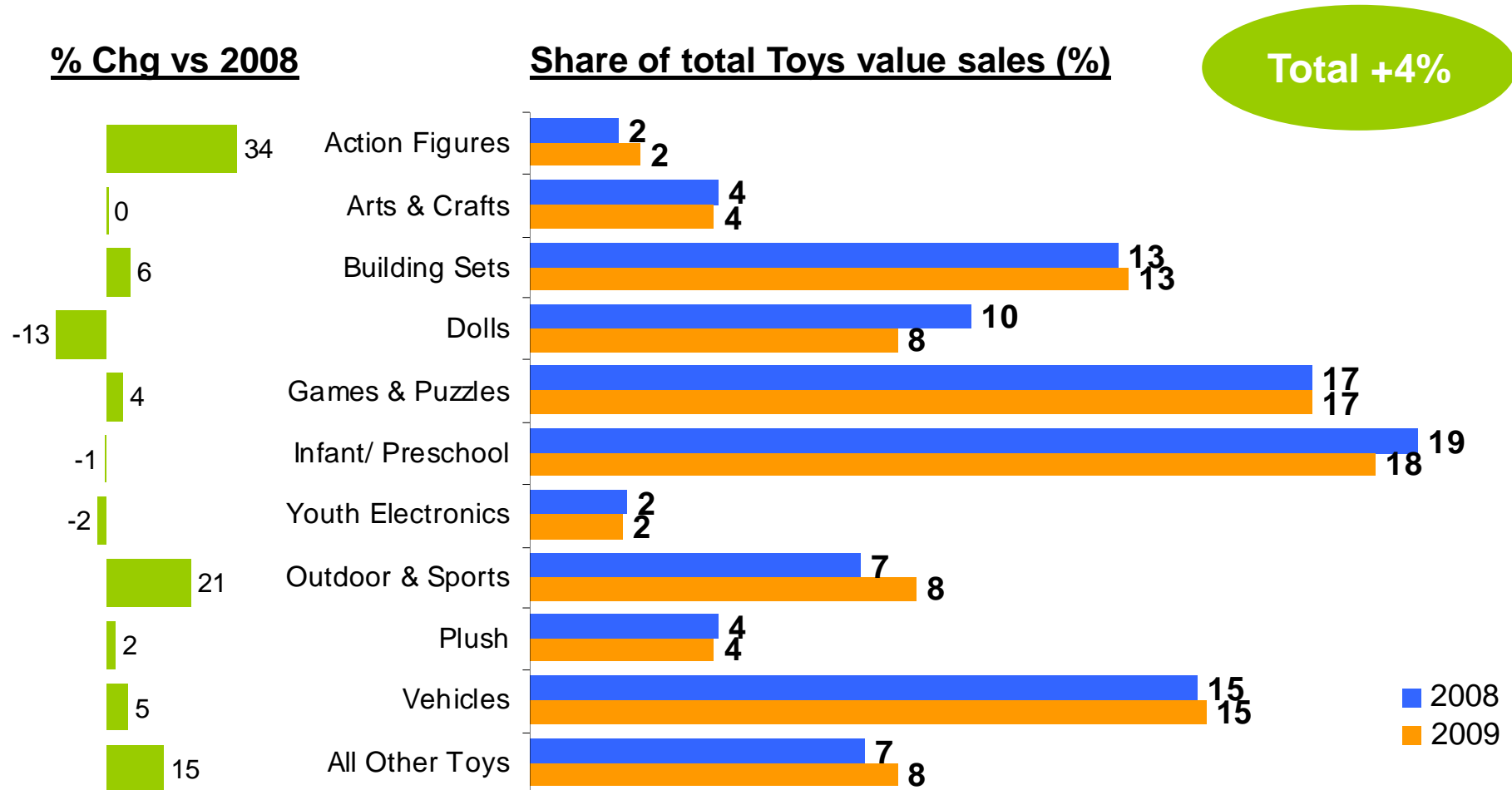
Sales by Channel – Share Value (%)





Distribution of Sales by Supercategory Value share (%) 2009 vs 2008

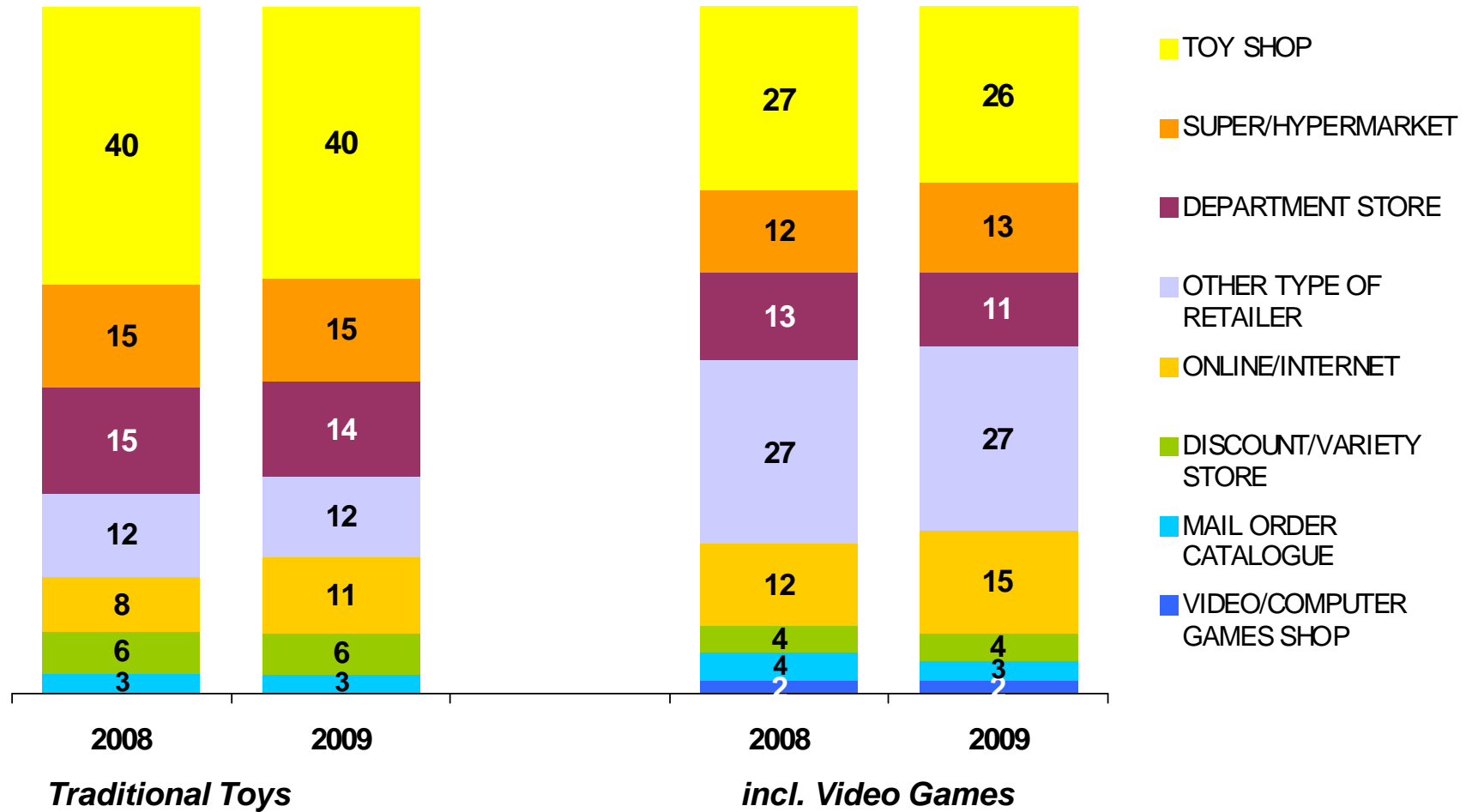
■ Action Figures showed strong growth, but market share remains small





Distribution of sales Traditional Toys & Video Games 2009

Sales by Channel – Share Value (%)





Traditional Toys Sales by Channel

Value share (%) January-December 2009 vs 2008

- Super/Hypermarkets replaced Department Stores as the second most important Channel in 2009

% Chg vs 2008

Total Market: €2,386m (+4%)

