

Overview of the Dutch Toy Market

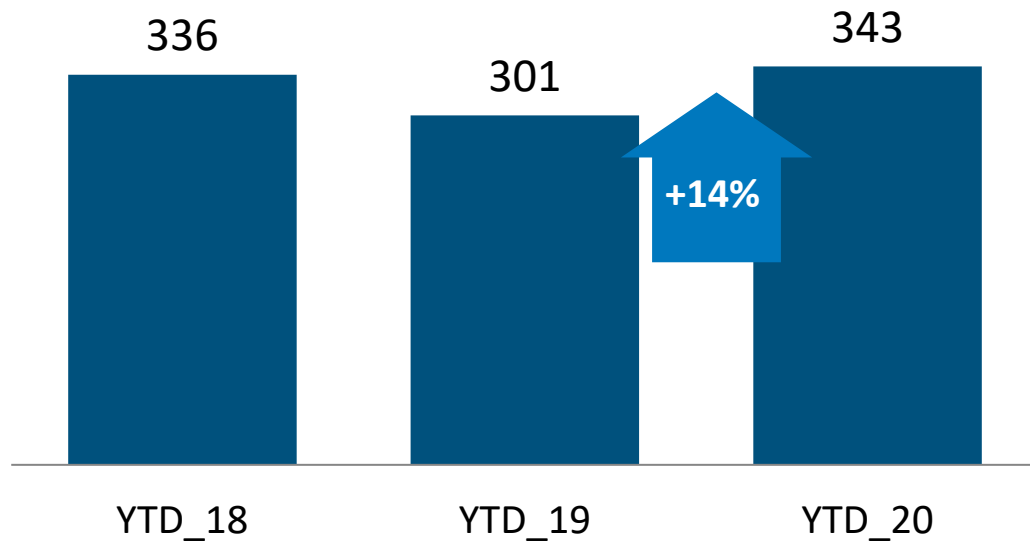
November 2020

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Toys & Games Sales

Sales in value (€M)



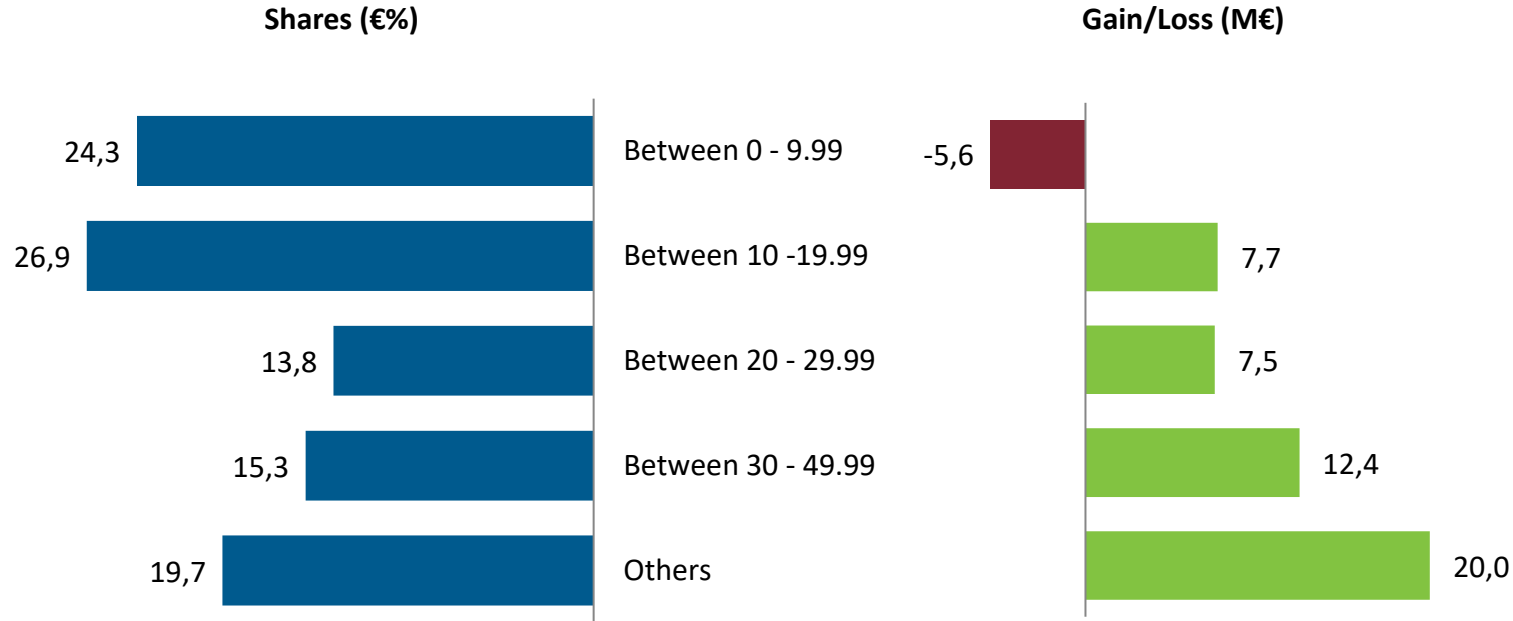
Average price
+17,5%

Sales in units
-3%

Source: The NPD Group | Retail Tracking Service | The Netherlands | YTD September 2020

Price points Share & Performances

Growth was driven by all price brackets above 10€



Source: The NPD Group | Retail Tracking Service | The Netherlands | YTD September 2020

Top Properties

6 out of 10 for LEGO



Source: The NPD Group | Retail Tracking Service | The Netherlands | YTD September 2020

Top 10 items ranked by value

Games & LEGO high price points most popular

<u>Item Description</u>	<u>Manufacturer</u>	<u>Subclass</u>	<u>Sales</u>	<u>Av. Price</u>
Ticket To Ride Europe	Asmodee Editions	Family Board/Action Games	€1.207.149	€37,45
L.O.L. Surprise! Doll Assortment	MGA Entertainment (Corp)	Playset Dolls & Collectibles	€994.626	€11,66
Super Mario Brothers Adventures Starter Course	The LEGO Group	Standard Building Sets	€958.772	€55,42
Technic Land Rover Defender	The LEGO Group	Standard Building Sets	€943.342	€153,11
30 Seconds	999 Games	Family Board/Action Games	€903.471	€31,89
Technic Bugatti Chiron Construction Kit 1:5	The LEGO Group	Standard Building Sets	€826.082	€298,84
Technic Liebherr R9800 Excavator	The LEGO Group	Standard Building Sets	€783.088	€355,76
Skip-Bo	Mattel (Corp)	Card Games	€780.522	€14,20
Spel QWIXX NL	White Goblin Games	Family Board/Action Games	€754.566	€12,00
Regenwormen	999 Games	Family Dice/Word/Other Games	€740.323	€14,11

Source: The NPD Group | Retail Tracking Service | The Netherlands | YTD September 2020

Q4 Expectations



Dutch playing more than ever
Families are self-centered, Parents
want to reassure & occupy their
children -
toys ARE a refuge



Positive trends since March shall
continue
Numerous growing properties
Newness going stronger months after
months



Q4 expectations:
More tangible gifts vs experience
Calendar shift (Prime Day, crowds...)
Online at record-level
Uncertainty economic impact
Staycations & less get-together

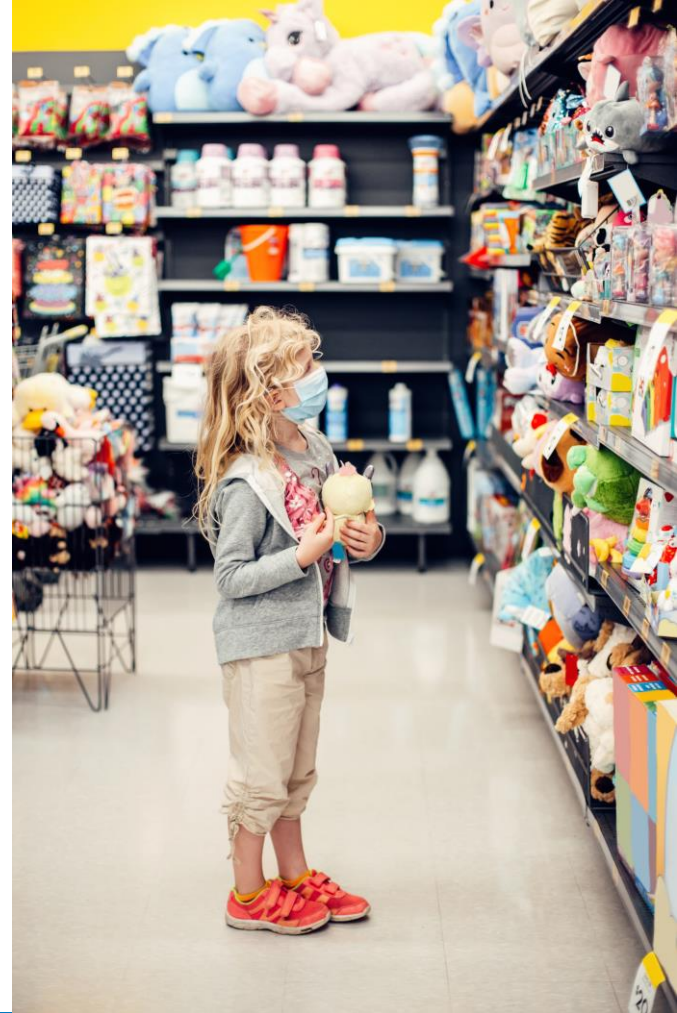
Changes in the Retail Landscape

Rise of **E-bazars**
(Alibaba, Wish, etc)

Stabilization of **Toys specialists**

Less in-store **traffic** but larger **average Baskets**

Online & offline **promotions**
activity



Channels Evolution

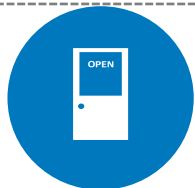
Online is still booming but physical stores up +2% YTD after decline in Q1

Channel evolution



Online

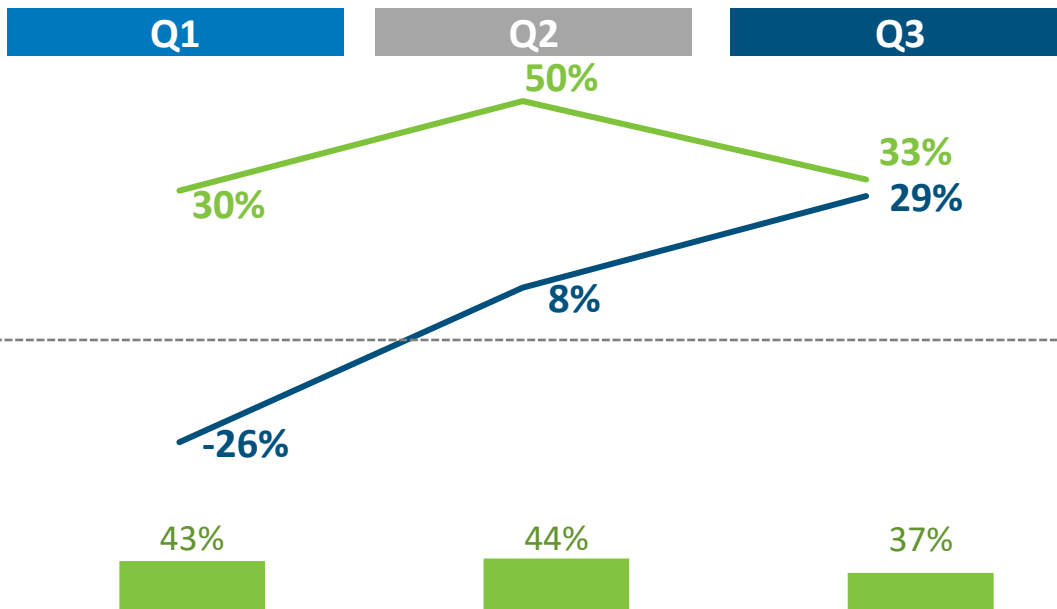
value % evolution



Offline

value % evolution

Online penetration



YTD September

+32%

+2%

Source: The NPD Group | Retail Tracking Service | Belgium YTD September 2020

THANK YOU

Apparel | Appliances | Automotive | B2B Technology | Beauty | Books | Consumer Technology | E-commerce
Fashion Accessories | Food Consumption | Foodservice | Footwear | Home | Juvenile Products | Media Entertainment
Mobile | Office Supplies | Retail | Sports | Toys | Travel Retail | Video Games | Watches

