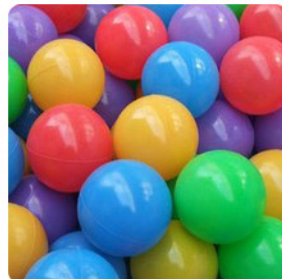
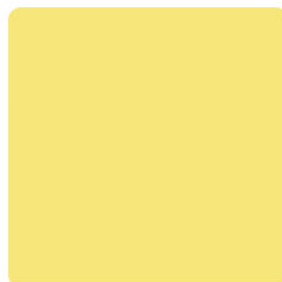


# 2012 Toy Industry Analysis Report

2013.05



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### Summary:

In recent years, affected by the economic crisis and the impact of structural adjustment toy market, Toy sales and its share of global toy sales ratio in Europe and other traditional markets trends to stabilize or even decline. Emerging markets such as ASEAN, the Middle East, South America, and Eastern Europe, strong demand, and gradually become an important region for China's toy exports.

From January to December 2012, China's toy industry industrial sales value cumulative increase of 15.6%, representing a decrease of 1.4 %. Export delivery value of the cumulative increase of 8.6%, was increased by 3.6% over the same period last year. Total sales rate of 98.2%, was increased by 0.6% over the same period last year. In 2012, the main business revenue of China's toy industry grew by 13.5%, was reduced by about 4.7% over the same period last year; cumulative total profit up 24.5%, was reduced by about 15.4% over the same period last year.

## 1. 2012 China Toy (HS: 9503) Industry Export Situation

- 2012 China's Major Toy Export Situation (Sorted by Export Value)

Product Name	Unit	Volume	Value(U.S. Dollar)	Compared with the Same Period of Last Year(±)	
				Volume	Value
Other Toys	A	18,256,269,141	4,404,269,183	15.8%	-0.1%
Animal Toys	A	1,565,942,917	1,701,979,854	-7.9%	-2.4%
Other Driving Force Device Toys and Models	A	289,872,784	1,230,565,603	-5.8%	3.4%
Other Toys, Assembling Kits or Full Set	Set	1,678,422,542	967,359,078	119.3%	35.4%
Tricycles, Scooters and Similar Wheeled Toys; Dolls Car	Kilogram	251,110,638	961,502,049	8.2%	17.3%
Intelligence Toys	Set	456,230,200	912,067,873	26.1%	12.9%
Doll	A	694,968,568	674,138,740	40.1%	14.2%
Goods Listed in Heading 9503 parts and accessories	Kilogram	22,599,074	251,697,117	-8.6%	4.9%
Other Reduced (Scaled) Full Model Components	Set	66,865,113	200,712,116	-17%	20.5%
Musical Toys	Kilogram	16,190,801	88,181,259	-12%	-3.7%
Electric Trains	Kilogram	3,196,409	43,204,139	9.6%	8.9%
Other Construction Sets and Constructional Toys	Set	6,868,874	16,217,942	228.5%	20.4%
Total	-	23,308,537,061	11,451,894,953	18%	5.8%

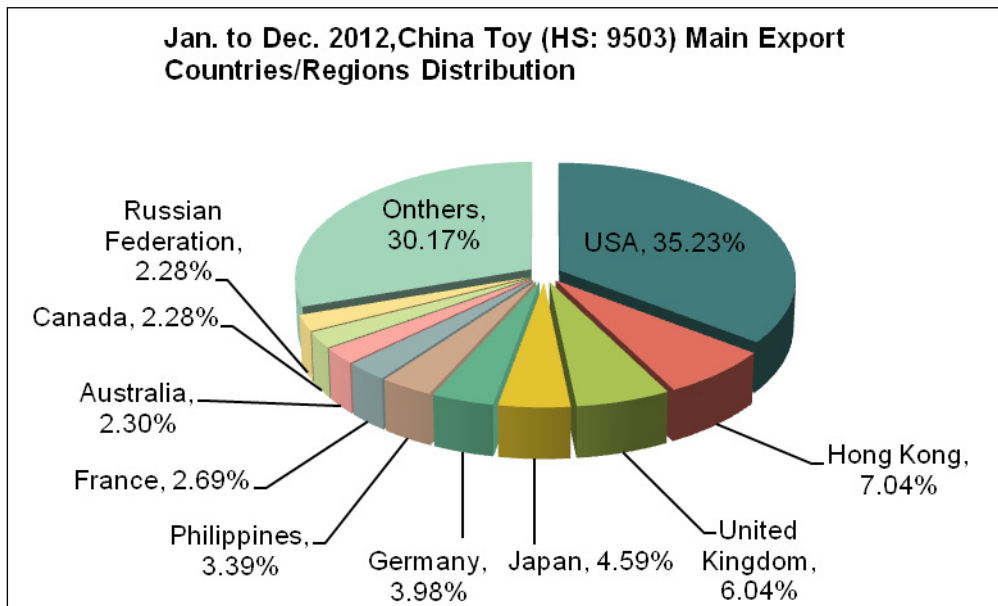
In 2012, China's toy exports value is 11.452 billion U.S. dollars, an increase of 5.8%, among them, the largest increase in exports was other construction sets and constructional toys, exports increased by 228.5%, followed by other toys, assembling kits or full, exports up growth of 119.3% year-on-year; biggest increase in exports was other toys, assembling kits or full set, exports grew by 35.4%, followed by other narrow (scaled down) a full set of model components, exports grew 20.5%.

## 1.1. Jan. - Dec. 2012, China's Toy Export Volume and Value

Month	Volume(-)	Value(U.S. Dollar)	Compared with the Same Period of Last Year(±)	
			Volume	Value
Jan.	2,739,766,251	823,113,435	51%	4%
Feb.	1,132,400,088	451,366,150	44.9%	6.7%
Mar.	1,577,326,724	710,694,066	15%	15.1%
Apr.	1,580,747,932	755,162,501	6.8%	3.8%
May.	1,697,063,268	865,163,882	17.2%	15.6%
Jun.	1,561,801,142	888,826,233	-1.4%	5.8%
Jul.	1,557,412,262	1,111,584,230	-3.1%	1.2%
Aug.	1,766,867,993	1,339,351,510	12.7%	2.3%
Sep.	1,654,457,463	1,489,092,107	-3.3%	8.4%
Oct.	2,003,626,579	1,346,378,813	25.1%	13.5%
Nov.	2,689,542,943	774,370,254	19.4%	-15.2%
Dec.	3,347,524,416	896,791,772	31.8%	12.4%
Accumulative Total	23,308,537,061	11,451,894,953	18%	5.8%

**1.2. Jan. - Dec. 2012, China Toy Main Export Countries/Regions Distribution**

No.	Country/Region	Accumulative Total		Accumulated Over Last Year(±)	
		Volume(-)	Value(U.S. Dollar)	Volume	Value
1	USA	5,659,325,766	4,035,010,123	15.8%	4.9%
2	Hong Kong	1,229,575,893	806,729,887	-17.2%	-1.7%
3	United Kingdom	650,712,473	691,751,459	1.3%	7.1%
4	Japan	753,608,885	525,324,878	3.8%	7.1%
5	Germany	537,806,468	456,300,191	-5.6%	-4.6%
6	Philippines	879,353,074	388,404,340	-29.3%	-12.1%
7	France	324,449,983	308,065,925	10.6%	-1.5%
8	Australia	277,281,603	263,509,814	12.9%	15.5%
9	Canada	252,018,137	261,241,485	-16.4%	2.1%
10	Russian Federation	262,945,616	260,823,331	16.7%	25.3%
11	Singapore	394,525,985	260,310,048	166.7%	163.6%
12	Mexico	1,004,423,272	246,013,860	169%	3.9%
13	Netherlands	531,107,222	226,939,918	34.6%	-5.8%
14	Italy	367,608,464	198,570,974	-22.4%	-16.2%
15	Korea	242,204,614	174,086,721	29.4%	31.8%
16	Spain	244,425,921	172,565,107	-4.7%	-10.7%
17	United Arab Emirates	346,442,320	172,002,707	25.7%	18.1%
18	Brazil	276,071,149	155,016,513	-2.1%	8.9%
19	Chile	1,105,918,660	137,833,522	83.8%	9.5%
20	Malaysia	284,067,481	137,216,845	96.9%	225.5%



2012 January to December, among the top ten China's toy exports country / region are the United States, Hong Kong, United Kingdom, Japan, Germany, Philippines, France, Australia, Canada and the Russian Federation. Among them, Chinese exports to the U.S. amounted to approximately \$ 4.035 billion, in the first place, getting an increase of 4.9 %, accounting for China's total exports of such products 35.23%.

Jan. - Dec.2012, among the top 20 China's toy exports countries / regions, the number of China's toys exports to Singapore increased by 166.7 %, which has the most rapid growth, the exports to Malaysia increased by 225.5 %, an increase of most rapidly.

**1.3. Jan. - Dec. 2012, China Toy (HS: 9503) Export Source**

No.	Region	Volume(-)	Value(U.S. Dollar)	Compared with the Same Period of Last Year(±)	
				Volume	Value
1	Guangdong	10,562,836,290	7,891,405,733	-5.9%	3.4%
2	Zhejiang	3,158,289,237	1,147,114,348	17.3%	17.7%
3	Jiangsu	3,499,424,584	1,033,942,135	53.3%	4.3%
4	Shanghai	211,037,819	381,383,488	-4.9%	6.7%
5	Shandong	183,116,049	292,539,273	-40.7%	-5.2%
6	Fujian	420,501,115	201,254,460	17.6%	16.3%
7	Jiangxi	192,903,206	189,544,974	93.7%	97.3%
8	Anhui	122,242,864	178,757,241	-4.7%	1.7%
9	Henan	89,990,005	33,781,147	3.3%	-4.8%
10	Hebei	3,807,654,663	20,755,927	103.5%	57.7%

Guangdong, Zhejiang and Jiangsu are toys main export sources, from January to December 2012, the total toys export volume of the above three provinces together accounted for 73.88 % of in total, the export value together accounted for 87.95% totally. Top 10 toys export sources; Hebei is the biggest increase in the volume of exports, the export volume increased by 103.5% year on year; Jiangxi Province, the largest increase in export value, exports increased by 97.3 % year on year.

(Source: China Customs network)



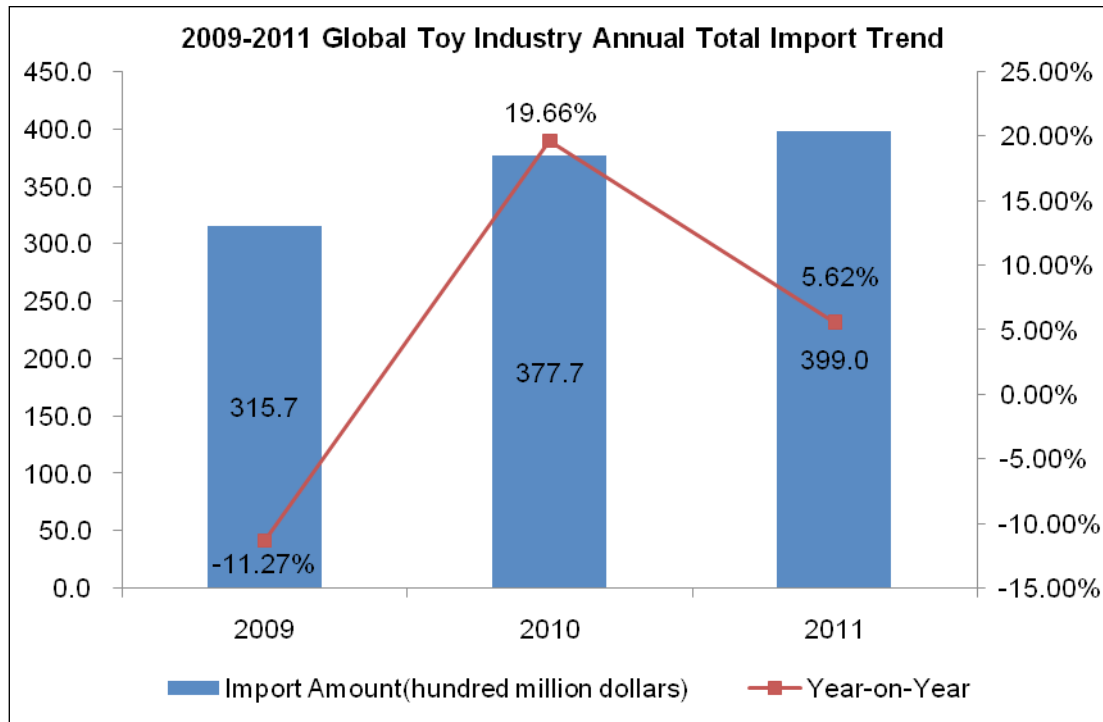
## 2. 2012 Global Toy (HS: 9503) Industry Import Situation

### 2.1. 2009-2011 Global Toy Industry Export Situation

- 2011 Global Major Toy Import Situation(Sorted by 2011 Import Value)

Product Name	Import Value in 2011(thousand U.S. dollars)	Year-On-Year
HS Code 950300: Tricycles, scooters, pedal cars and similar wheeled toys; dolls' carriages	39,796,256	5.98%
HS Code 950390: Toys nesoi	63,666	-38.74%
HS Code 950380: Toys and models, incorporating a motor	8,847	-64.13%
HS Code 950330: Construction sets and constructional toys, nesoi	7,262	-57.26%
HS Code 950349: Toys (except stuffed) representing animals or non-human creatures (for example, robots and monsters) and parts and accessories thereof	4,780	-70.79%
HS Code 950341: Stuffed toys representing animals or non-human creatures	4,748	-71.05%
HS Code 950370: Toys, put up in sets or outfits	3,649	-83.62%
HS Code 950350: Toy musical instruments and apparatus	2,484	-64.50%
HS Code 950320: Reduced-size (scale) model assembly kits, working models or not, excluding electric trains; parts and accessories thereof	1,934	-72.39%
HS Code 950360: Puzzles	1,180	-79.50%
HS Code 950310: Electric trains, including tracks, signals and other accessories thereof	914	-66.62%
Total	39,895,721	5.62%

## 2.2. 2009-2011 Global Toy Industry Annual Total Import Trend



2009-2011 the total global toy import upward trend, imports amounted to \$ 31.57 billion (down 11.27%), \$ 37.77 billion (an increase of 19.66%) and \$ 39.9 billion (an increase of 5.62%).

**2.3. 2009-2011 Global Toy Main Demand Countries / Regions Import Value (Sorted by 2011 Import Value)**

No.	Import Country/Region	Import Value(thousand U.S. dollars)		
		2009	2010	2011
1	USA	9,828,948	11,916,515	11,527,881
2	Germany	2,119,325	2,275,505	2,669,542
3	United Kingdom	1,953,830	2,437,715	2,360,489
4	Hong Kong	2,092,625	2,285,455	2,228,510
5	France	1,500,495	1,803,227	2,015,203
6	Japan	1,518,025	1,659,572	1,905,208
7	Canada	970,974	1,198,852	1,209,874
8	Italy	986,553	1,122,331	1,199,503
9	Belgium	918,513	937,782	1,001,678
10	Russian Federation	417,534	865,279	986,733
11	Spain	805,910	926,920	913,537
12	Australia	636,195	772,734	853,353
13	Mexico	496,354	688,635	810,379
14	Netherlands	643,593	747,661	771,262
15	Czech	495,753	610,385	763,661
16	Poland	395,755	460,268	502,840
17	Turkey	193,809	285,557	419,339
18	Korea	256,959	319,138	407,499
19	Austria	332,345	345,215	398,002
20	Brazil	231,900	313,257	396,993

## 2.4. 2009-2011 Global Toy Main Demand Countries / Regions Market Share (Sorted by 2011 Import Value)

No.	Import Country/Region	Import Value Proportion (%)		
		2009	2010	2011
1	USA	31.14%	31.55%	28.90%
2	Germany	6.71%	6.02%	6.69%
3	United Kingdom	6.19%	6.45%	5.92%
4	Hong Kong ↓	6.63%	6.05%	5.59%
5	France ↑	4.75%	4.77%	5.05%
6	Japan	4.81%	4.39%	4.78%
7	Canada	3.08%	3.17%	3.03%
8	Italy	3.13%	2.97%	3.01%
9	Belgium	2.91%	2.48%	2.51%
10	Russian Federation ↑	1.32%	2.29%	2.47%
11	Spain ↓	2.55%	2.45%	2.29%
12	Australia ↑	2.02%	2.05%	2.14%
13	Mexico ↑	1.57%	1.82%	2.03%
14	Netherlands ↓	2.04%	1.98%	1.93%
15	Czech ↑	1.57%	1.62%	1.91%
16	Poland	1.25%	1.22%	1.26%
17	Turkey ↑	0.61%	0.76%	1.05%
18	Korea ↑	0.81%	0.84%	1.02%
19	Austria	1.05%	0.91%	1.00%
20	Brazil ↑	0.73%	0.83%	1.00%

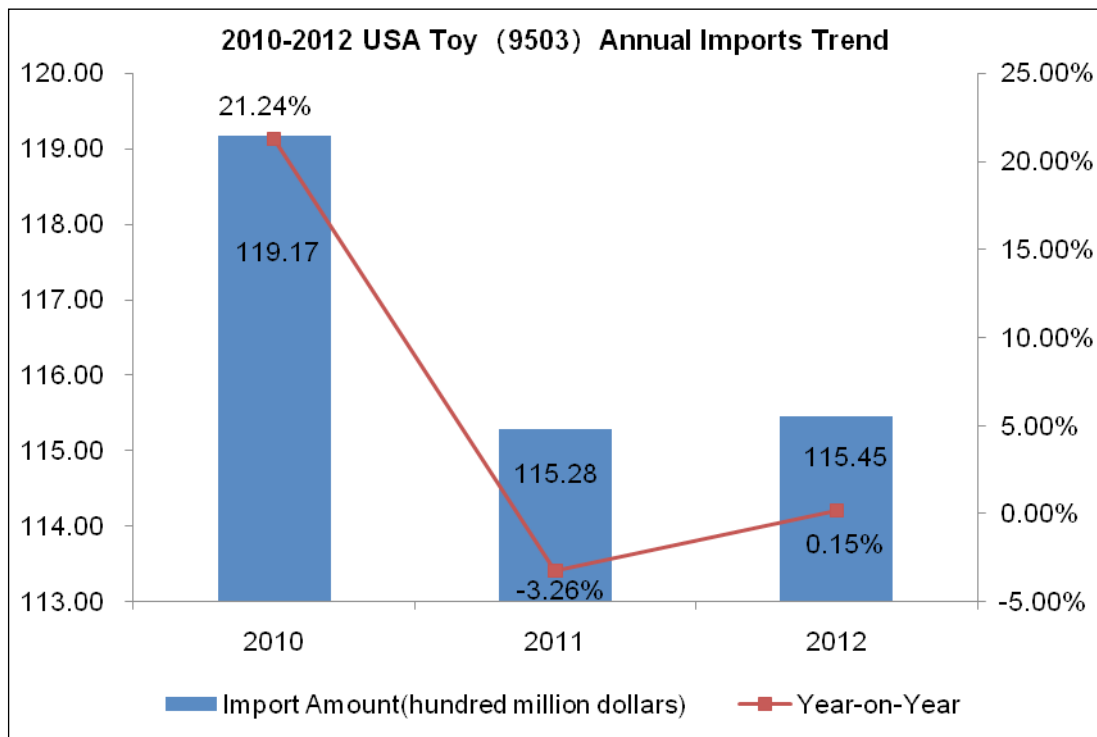
Note: ↑ behalf 2009-2011 export value accounted for the proportion of total world exports continued to rise, ↓ represents the 2009-2011 export value accounted for the proportion of total world exports continued to decline.

In 2011, the top 20 global toys demand countries / regions are the United States, Germany, Britain, Hong Kong, France, Japan, Canada, Italy, Belgium, the Russian Federation, Spain, Australia, Mexico, the Netherlands, the Czech Republic, Poland, Turkey, South Korea, Austria and Brazil, in 2011 this 20 countries / regions imports accounted for 83.57 % of total world imports. Which for three consecutive years, Three consecutive years 2009-2011, the increased share of imports countries / regions are France, the Russian Federation, Australia, Mexico, the Czech Republic, Turkey, South Korea and Brazil; 2009-2011 shares of imports declined for three consecutive years the countries / regions are Hong Kong, Spain and the Netherlands.

### 3. 2012 Toy (HS: 9503) Main Demand Countries Import Situation

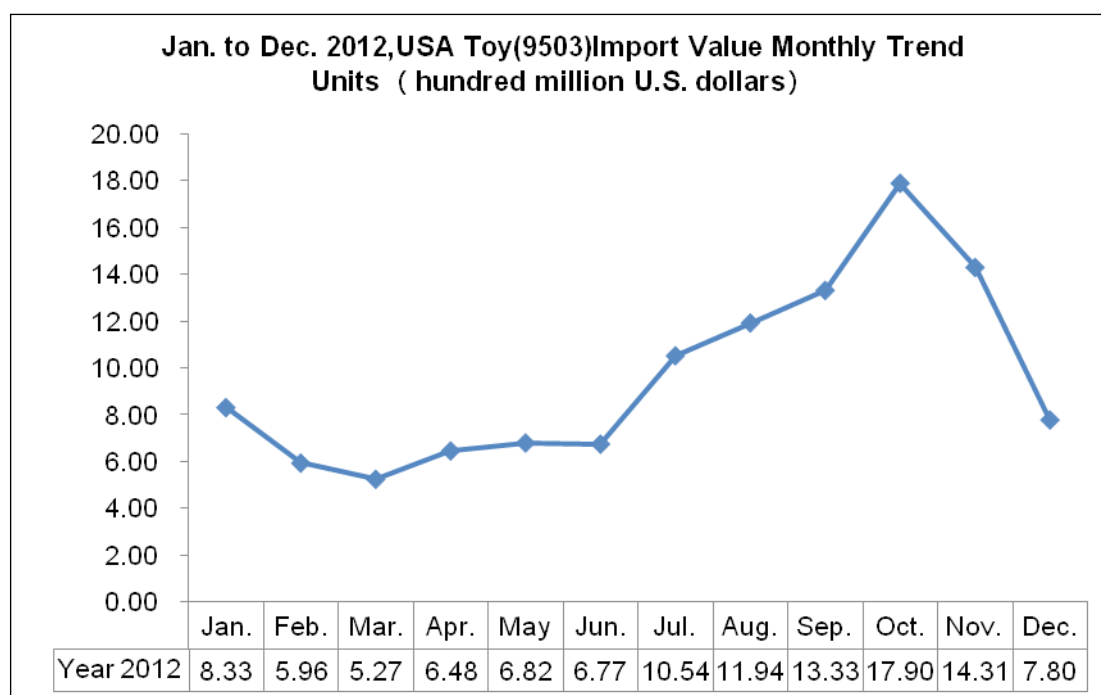
#### 3.1. 2010-2012 USA Toy (HS: 9503) Main Import Situation

- 2010-2012 USA Toy Import Trend



2010-2012 the amount of U.S. toy imports inverted “V” shape. Three years of imports amounted to \$ 11.917 billion (an increase of 21.24%), \$ 11.528 billion (down by 3.26%) and \$ 11.545 billion (an increase of 0.15%).

- 2012 USA Toy Import Value Monthly Trend



Jan. to Dec. 2012, the U.S. toy imports monthly trend shows that in the second half imports is significantly higher than the first half, in October, imports reached the annual maximum, \$ 1.79 billion.

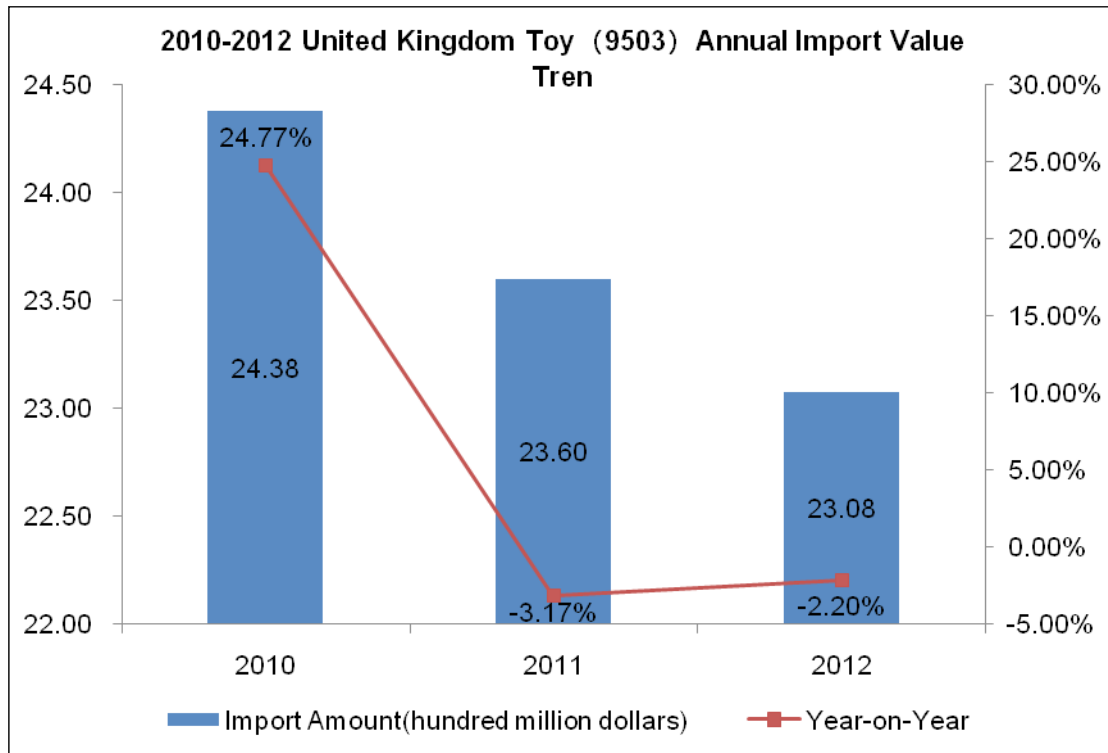
- 2012 USA Toy(HS:9503)Main Import Source

No.	Country/Region	Import Value(thousand U.S. dollars)	Year-on-Year	Proportion
	Total	11,545,197	0.15%	100.00%
1	China	9,887,161	-0.92%	85.64%
2	Mexico	575,396	56.76%	4.98%
3	Indonesia	201,222	8.61%	1.74%
4	Chinese Taipei	172,921	16.63%	1.50%
5	Vietnam	117,601	21.73%	1.02%
6	Hong Kong	82,019	6.31%	0.71%
7	Canada	78,166	26.38%	0.68%
8	Denmark	73,321	-68.68%	0.64%
9	Thailand	70,719	-2.75%	0.61%
10	Germany	52,776	8.43%	0.46%

2012 the top 10 USA toy import countries/regions are China, Mexico, Indonesia, Chinese Taipei, Vietnam, Hong Kong, Canada, Denmark, Thailand and Germany, the Imports from the above ten countries/regions accounted for 97.98 % of total imports. China is the main import source, in 2012, the toy import value from China accounted for USA imports that year the amount of 85.64%.

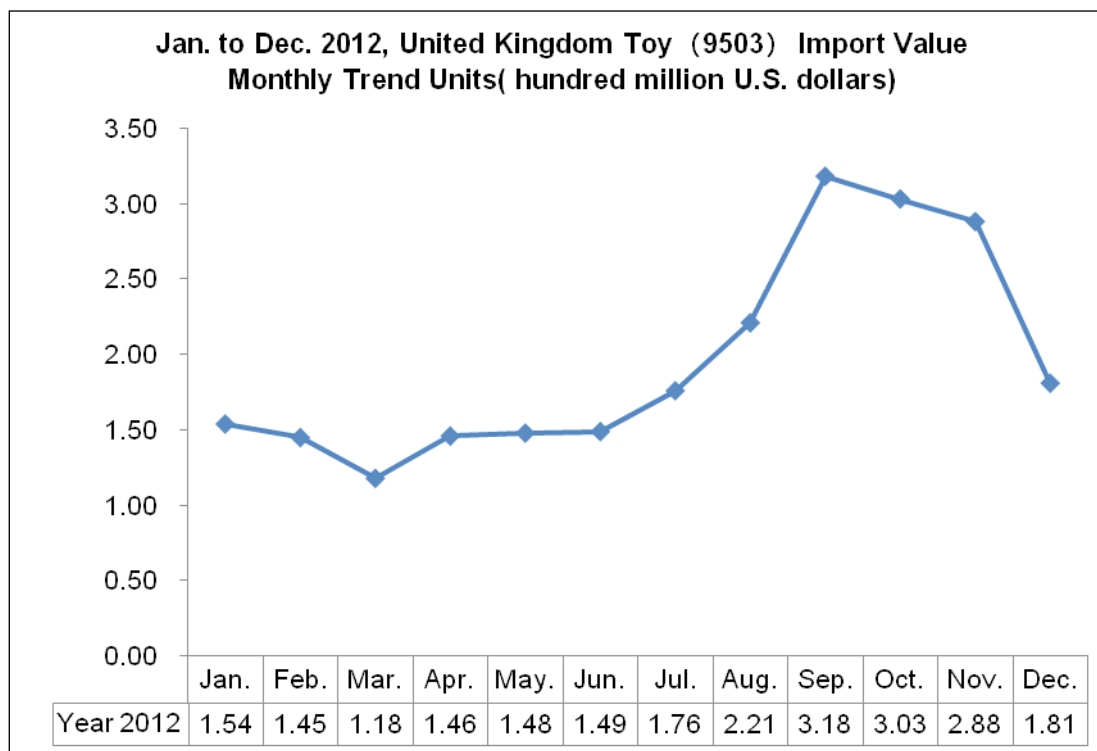
## 3.2. 2010-2012 United Kingdom Toy (HS: 9503) Main Import Situation

- 2010-2012 United Kingdom Toy Import Value Trend



2010-2012 United Kingdom toy import value declined year by year. The Import value is respectively \$ 2.438 billion (an increase of 24.77%), \$ 2.36 billion (down by 3.17%) and \$ 2.308 billion (down by 2.20%).

- United Kingdom Toy Import Value Monthly Trend



Jan. to Dec. 2012, United Kingdom Toy Import value monthly trend shows that the second half of imports is significantly higher than the first half .In September, imports reached the annual maximum, \$ 318 million.

- 2012 United Kingdom Toy(HS:9503)Main Import Source

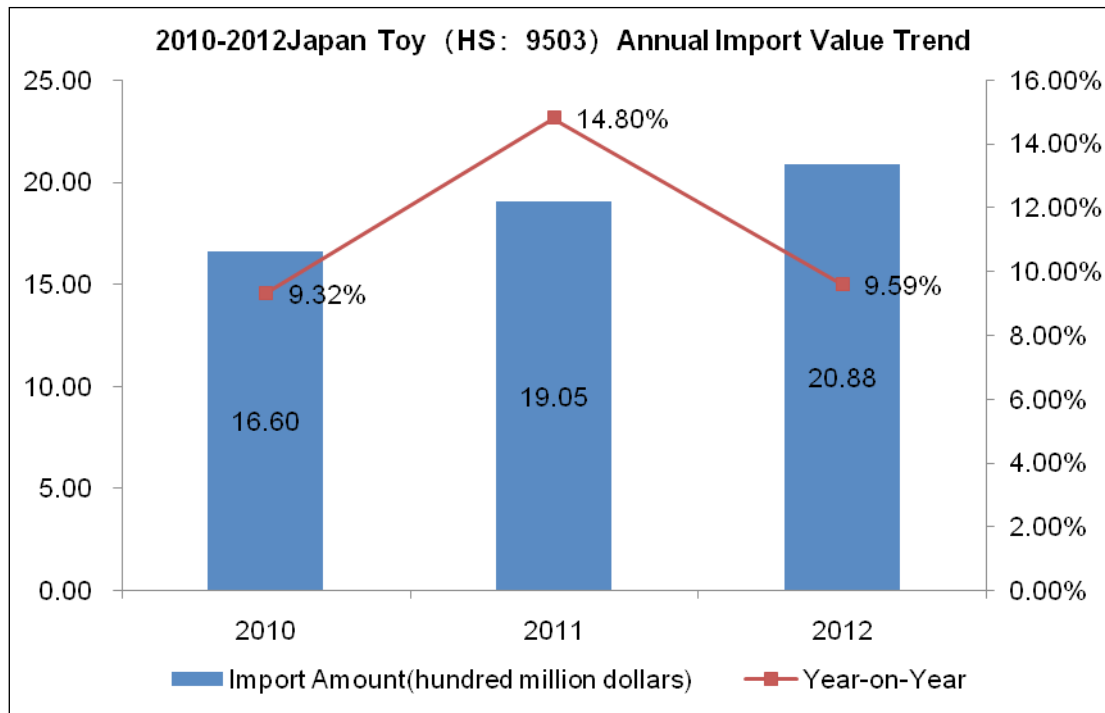
No.	Country/Region	Import Value(thousand U.S. dollars)	Year-on-Year	Proportion
	Total	2,308,461	-2.20%	100.00%
1	China	1,570,527	-3.74%	68.03%
2	Czech Republic	213,389	25.32%	9.24%
3	Hong Kong	89,505	-17.08%	3.88%
4	Germany	74,877	-1.99%	3.24%
5	USA	46,270	-11.33%	2.00%
6	Ireland	38,304	-24.40%	1.66%
7	Indonesia	30,950	31.13%	1.34%
8	Chinese Taipei	30,765	-6.11%	1.33%
9	Netherlands	20,458	-28.39%	0.89%
10	Vietnam	19,886	-19.80%	0.86%

2012 the top 10 United Kingdom toy import countries/regions are China, Czech Republic, Hong Kong, Germany, the USA, Ireland, Indonesia, Chinese Taipei, Netherlands and Vietnam, the Imports from the above ten countries/regions accounted for 92.48% of total imports. China is the main import source, in 2012,the toy import value from China accounted for United Kingdom imports that year the amount of 68.03%.



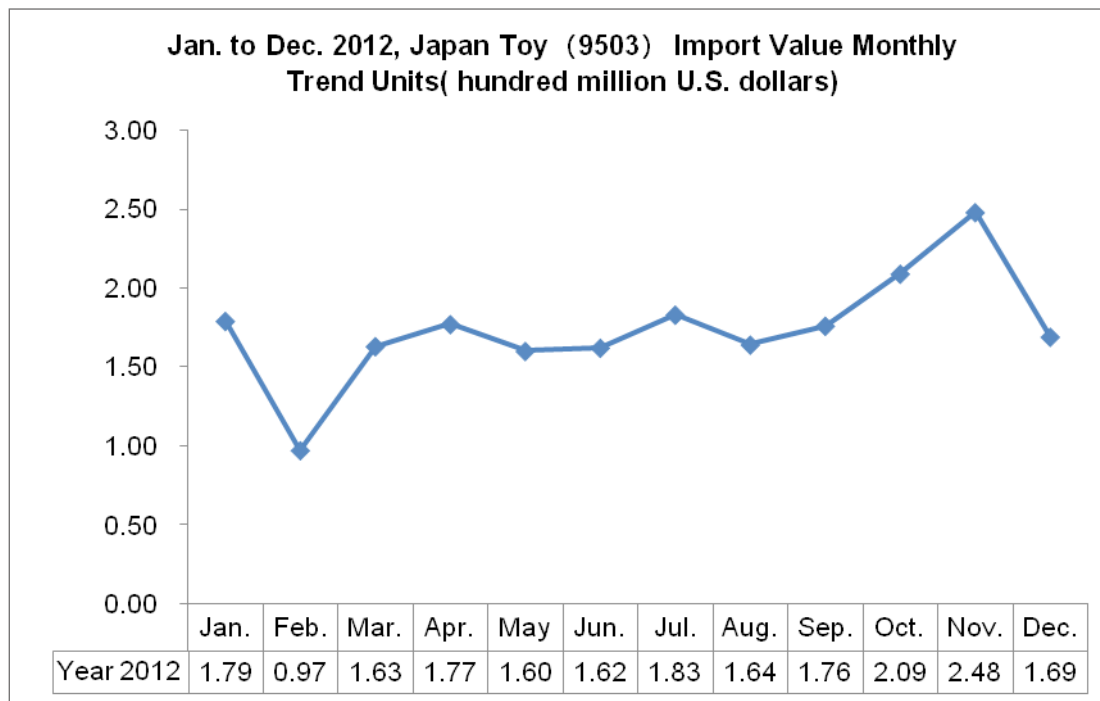
## 3.3. 2010-2012 Japan Toy (HS: 9503) Main Import Situation

- 2010-2012 Japan Toy Import Trend



2010-2012 Japan Toy Import value increased year by year. The Import value is respectively \$ 1.660 billion (an increase of 9.32%), \$ 1.905 billion (up to 14.80%) and \$ 2.088 billion (an increase of 9.59%).

- Japan Toy Import Value Monthly Trend



Jan. to Dec. 2012, Japan Toy Import value monthly trend shows that the highest amount of imports is in Nov. \$ 248 million, and the lowest amount of imports is in Feb.\$ 97million.

- 2012Japan Toy(HS:9503)Mani Import Source

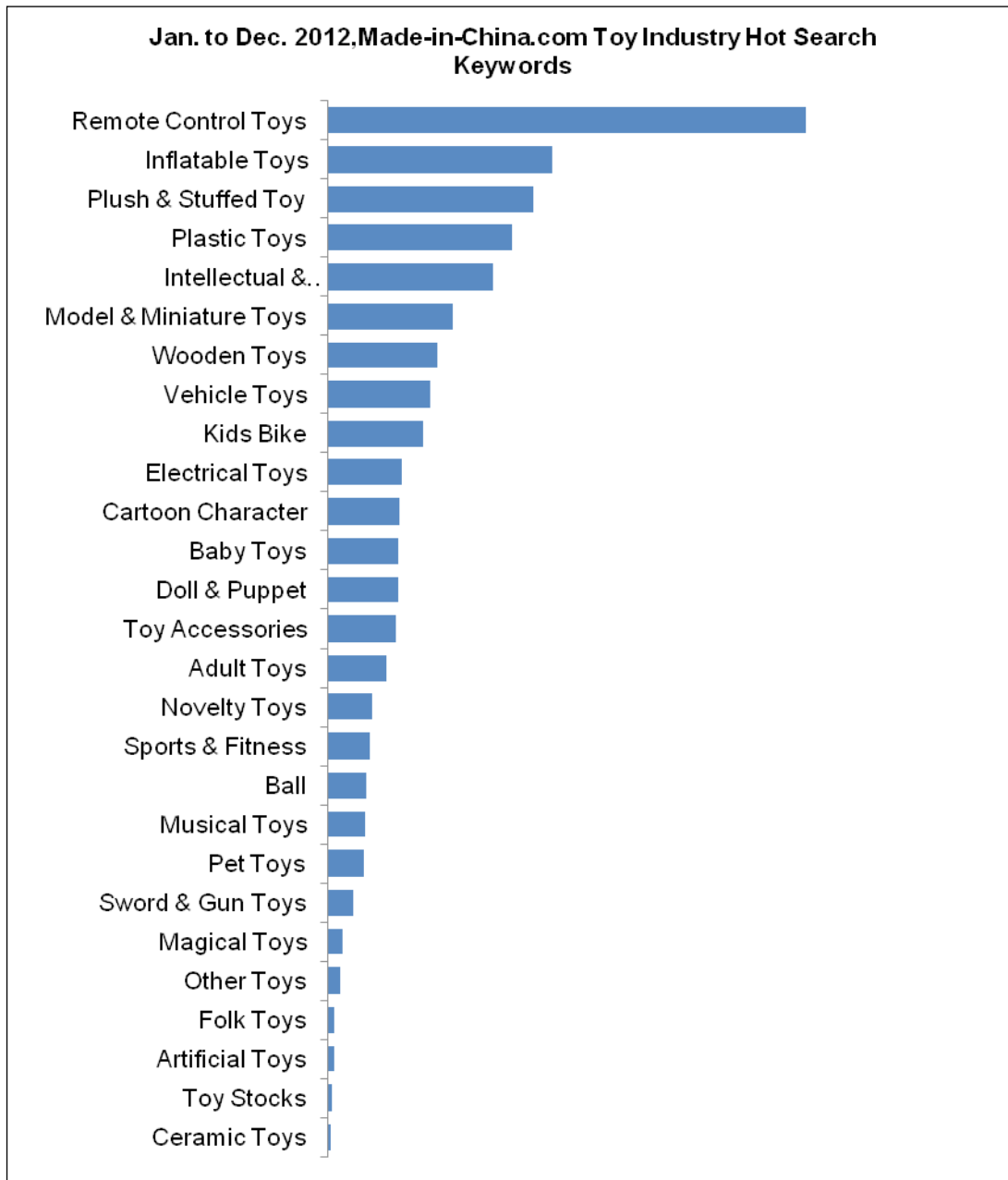
No.	Country/Region	Import Value(thousand U.S. dollars)	Year-on-Year	Proportion
	Total	2,087,966	9.59%	100.00%
1	China	1,794,939	7.90%	85.97%
2	Vietnam	78,340	73.34%	3.75%
3	Thailand	40,664	-5.72%	1.95%
4	Denmark	35,278	26.56%	1.69%
5	Chinese Taipei	30,305	16.70%	1.45%
6	Philippines	18,231	51.61%	0.87%
7	Germany	13,104	0.85%	0.63%
8	Czech Republic	11,108	-21.04%	0.53%
9	Republic of Korea	9,943	-1.48%	0.48%
10	USA	9,442	-4.44%	0.45%

2012 the top 10 Japan toy import countries/regions are China, Vietnam, Thailand, Denmark, Chinese Taipei, Philippines, Germany, Czech Republic, Republic of Korea and the USA, the Imports from the above ten countries/regions accounted for 97.77% of total imports. China is the main import source, in 2012,the toy import value from China accounted for Japan imports that year the amount of85.9%.

(Data Source: UN COMTRADE)

## 4. Made-in-China.com Toy Industry Data Analysis

### 4.1. Made-in-China.com Toy Industry Hot Search Keywords

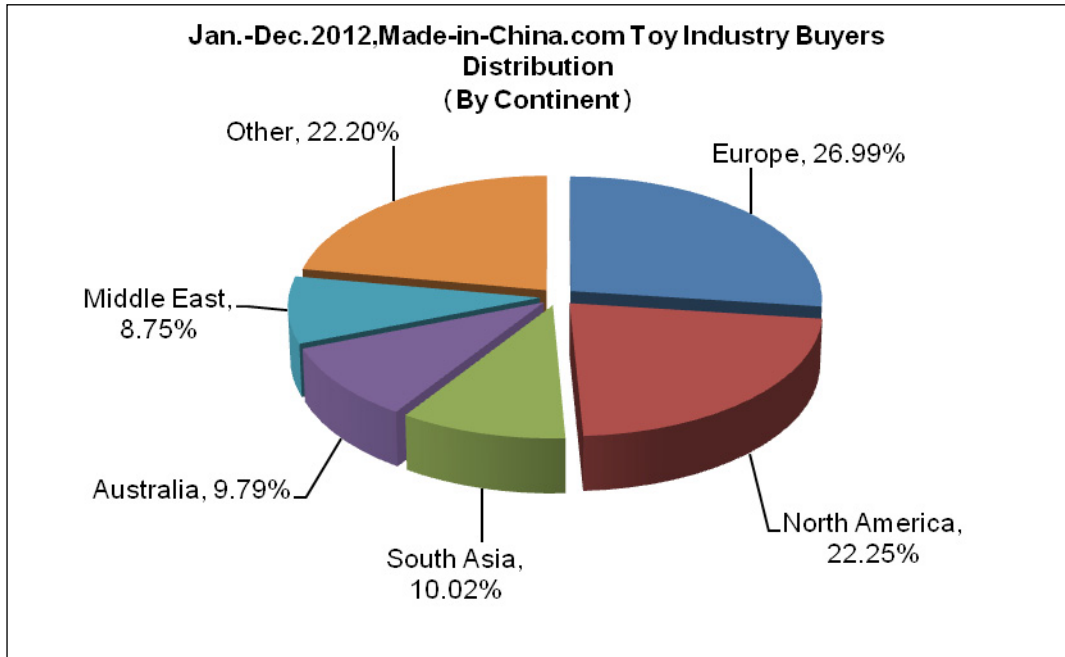


Made-in-China.com data shows: 2012 toy industry buyers highest attention specie is Remote Control Toys, much higher than the second Inflatable Toys. Plush & Stuffed Toy, Plastic Toys, Intellectual & Educational Toys are ranked third to fifth place.

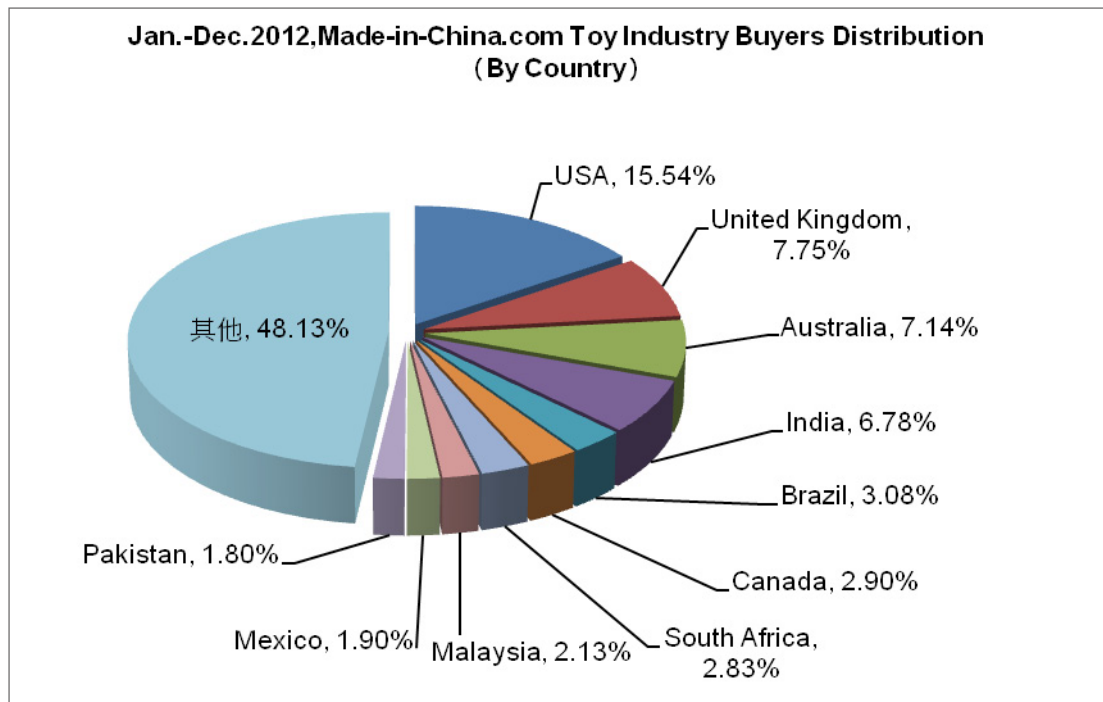
#### 4.2. Made-in-China.com Toy Industry Buyers Distribution

The following data statistical time as of Dec. 31, 2012

By Continent



## By Country



According to Jan. - Dec. 2012 Made-in-China.com data statistics, Toy industry buyers are mainly distributed in Europe, North America, South Asia, Australia and Middle East and other regions. Buyer is more distributed in the USA, United Kingdom, Australia, India, Brazil and other countries.

(Data Source: Made-in-China.Com)

The IAR Team of Made-in-China.com dedicates to surveying,excavating and collating industry information for supplying the service of timely and exact information analysis, providing necessary information and dates for clients'decision.

Thanks for reading the report, if you have any questions,opinions or advices, please contact us.

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*Web:* <http://www.made-in-china.com/communication/market-analysis.html>



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