

2011-2014 Toy

Industry Analysis Report

2014.08



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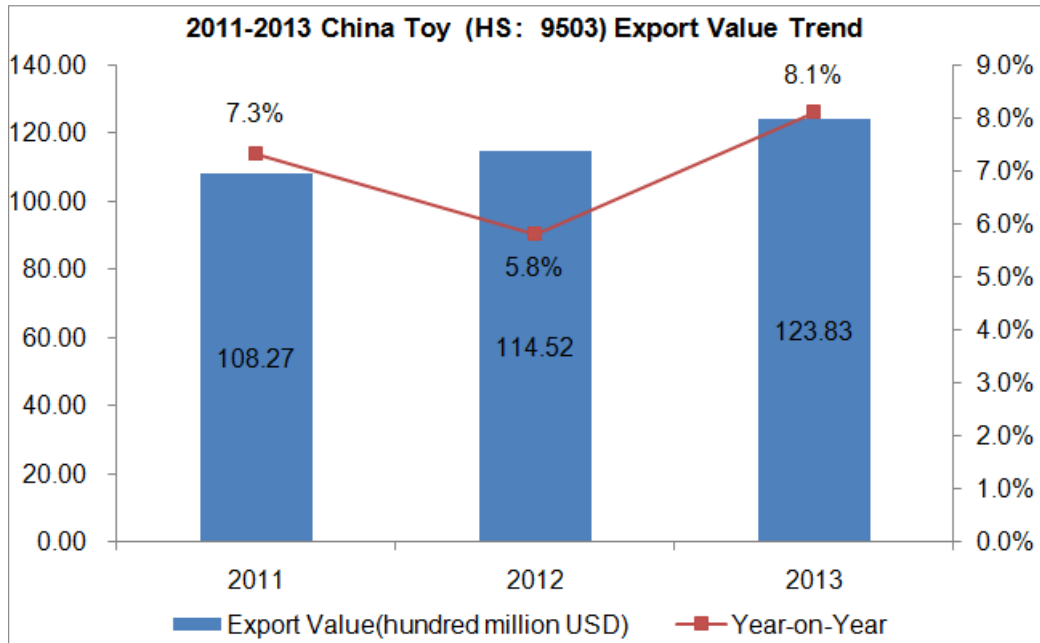
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Note:

HS Code	Product Name
9503	Tricycles, scooters, pedal cars and similar wheeled toys; dais carriages5 dolls; Other toys; reduced size (“scale”) models and similar recreational models working or not; puzzles of all kinds, hereinafter referred to as “toy”

1. 2011-2013 China Toy (HS: 9503) Export Trend Analysis

1.1. 2011-2013 China Toy Export Value Trend



As can be seen from the above chart, China toys export value increased year-on-year (YOY) from 2011 to 2013. The export value for 2013 amounted to 12.383 billion US dollars, an increase of 8.1% compared with the same period in 2012.

1.2. 2011-2013 China Toy Export Markets Analysis

No.	Countries/Regions	Export Value (USD)			Export Value Growth Compared 2013 with 2011
		2011	2012	2013	
1	USA	3,846,713,657	4,035,010,123	4,314,705,334	12.17%
2	Hong Kong	820,597,188	806,729,887	891,164,820	8.60%
3	United Kingdom	646,004,516	691,751,459	726,292,008	12.43%
4	Japan	490,432,939	525,324,878	558,127,166	13.80%
5	Germany	478,512,342	456,300,191	477,551,783	-0.20%
6	Philippines	441,727,953	388,404,340	452,942,513	2.54%
7	Singapore	98,753,848	260,310,048	327,879,484	232.02%
8	Russian Federation	208,098,459	260,823,331	314,725,838	51.24%
9	Canada	255,769,612	261,241,485	286,075,885	11.85%
10	France	312,700,827	308,065,925	284,391,448	-9.05%
11	Mexico	236,778,041	246,013,860	284,187,964	20.02%
12	Australia	228,210,343	263,509,814	283,965,975	24.43%
13	Netherlands	241,028,403	226,939,918	244,729,239	1.54%
14	Republic of Korea	132,082,425	174,086,721	202,897,185	53.61%
15	Belgium	141,347,870	136,530,651	191,620,861	35.57%
16	Italy	237,054,416	198,570,974	183,687,252	-22.51%
17	Spain	193,317,669	172,565,107	176,430,433	-8.74%
18	Brazil	142,330,493	155,016,513	169,771,196	19.28%
19	Chile	125,907,427	137,833,522	148,510,810	17.95%
20	United Arab Emirates	145,642,177	172,002,707	146,457,951	0.56%

The three largest export markets of Chinese toys are the USA, Hong Kong and United Kingdom. China's export values to the USA, Hong Kong and United Kingdom in 2013 are 4.315 billion US dollars, 0.891 billion US dollars and 0.726 billion US dollars respectively, an increase of 12.17%, 8.6% and 12.43% compared with 2011. Among the twenty export markets above, the export value of China to Singapore increased the most, an increase of 232.02% in 2013 compared with 2011.

1.3. 2011-2013 China Toy Export Market Share Analysis

No.	Countries/Regions	Value Percentage		
		2011	2012	2013
1	USA↓	35.53%	35.23%	34.84%
2	Hong Kong	7.58%	7.04%	7.20%
3	United Kingdom	5.97%	6.04%	5.87%
4	Japan	4.53%	4.59%	4.51%
5	Germany↓	4.42%	3.98%	3.86%
6	Philippines	4.08%	3.39%	3.66%
7	Singapore↑	0.91%	2.27%	2.65%
8	Russian Federation↑	1.92%	2.28%	2.54%
9	Canada	2.36%	2.28%	2.31%
10	France↓	2.89%	2.69%	2.30%
11	Mexico	2.19%	2.15%	2.29%
12	Australia	2.11%	2.30%	2.29%
13	Netherlands	2.23%	1.98%	1.98%
14	Republic of Korea↑	1.22%	1.52%	1.64%
15	Belgium	1.31%	1.19%	1.55%
16	Italy↓	2.19%	1.73%	1.48%
17	Spain↓	1.79%	1.51%	1.42%
18	Brazil↑	1.31%	1.35%	1.37%
19	Chile	1.16%	1.20%	1.20%
20	United Arab Emirates	1.35%	1.50%	1.18%

Note: “↑” represents that the indicators listed continued to increase from 2011 to 2013, “↓” represents that the indicators listed continued to decrease from 2011 to 2013.

The data of 2013 shows that the USA, Hong Kong and United Kingdom, the three largest export markets of toys from China, accounted for 34.84%, 7.2% and 5.87% of the total export value respectively.

Judging from the three-year market share, the proportion of import value for Singapore, the Russian Federation, the Republic of Korea and Brazil continued to rise, while that of the USA, Germany, France, Italy and Spain continued to decline.

2.China Toy (HS: 9503) Exports, from Jan. to Mar. 2014

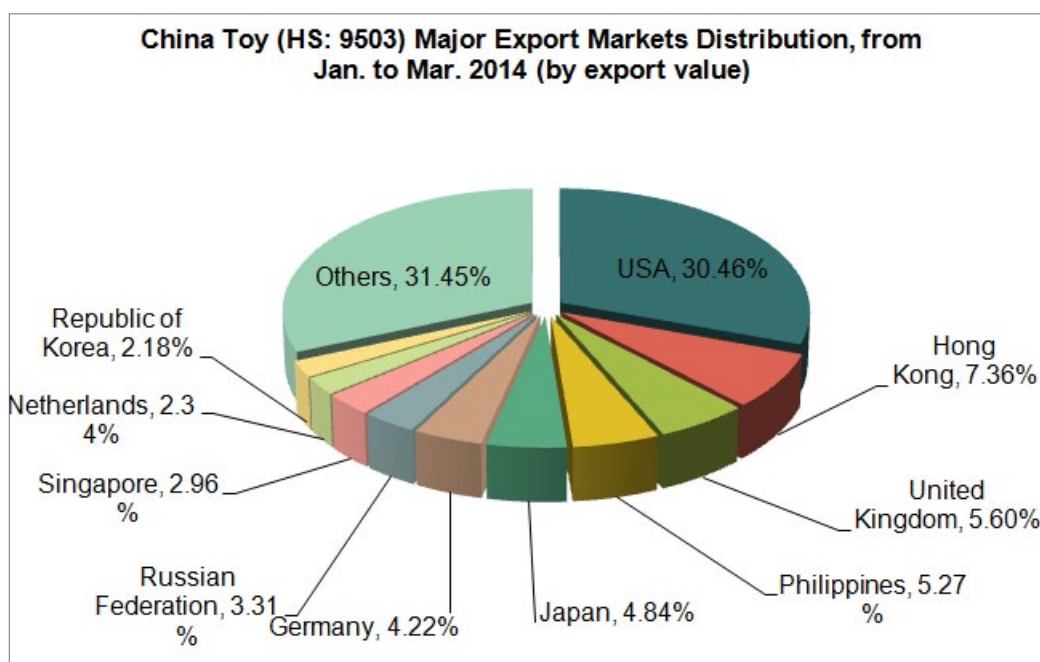
2.1. China Toy Export Volume and Value, from Jan. to Mar. 2014

Month	Volume (-)	Value (USD)	Compared with the same period last year	
			Volume	Value
Jan.	5,056,191,835	1,010,678,204	69.4%	19.9%
Feb.	1,210,782,287	510,747,128	-35.5%	-10.8%
Mar.	2,021,029,355	762,862,860	45.1%	19.1%
Jan.-Mar. Total	8,288,003,477	2,284,288,192	32.5%	11.1%

China's export value for toys from Jan. to Mar. 2014 amounted to 2.284 billion US dollars, an increase of 11.1% compared with the same period of previous year.

2.2. China Toy Major Export Countries/Regions Distribution, from Jan. to Mar. 2014

No.	Country	Volume (-)	Value (USD)	Compared with the same period last year	
				Volume	Value
1	USA	1,331,388,693	695,793,501	-7.7%	10%
2	Hong Kong	223,193,149	168,184,719	-28.4%	7.1%
3	United Kingdom	140,315,193	127,945,453	0.9%	12.5%
4	Philippines	240,311,157	120,273,998	18.3%	48.1%
5	Japan	143,268,576	110,523,223	-4.3%	-7.1%
6	Germany	106,093,038	96,293,591	-1%	5.5%
7	Russian Federation	110,914,002	75,719,362	98.5%	19.3%
8	Singapore	117,699,322	67,689,120	11.9%	-2.5%
9	Netherlands	152,116,232	53,499,708	17.1%	37%
10	Republic of Korea	50,827,940	49,894,926	16.7%	30.1%
11	Canada	85,028,510	48,843,027	-4.3%	7.3%
12	France	56,700,483	44,083,162	-19.4%	4.7%
13	Mexico	347,510,844	42,905,707	762.9%	43.7%
14	Australia	45,626,395	42,070,589	-8%	2.5%
15	United Arab Emirates	76,258,714	38,785,649	15.2%	29.6%
16	Belgium	59,372,743	37,212,825	37.1%	14%
17	Spain	71,526,849	36,154,114	21%	40%
18	Brazil	46,187,812	34,499,603	-11.1%	12.8%
19	Italy	79,566,535	32,846,572	39.8%	21.3%
20	Chile	65,953,300	25,578,499	-45%	17.3%



China's toys main export markets were the United States, Hong Kong, the United Kingdom, the Philippines and Japan and so on from Jan. to Mar., 2014. Among which, the export value to the United States accounted for 30.46% of the total export value of the products.

2.3. China Toy Original Places of Exported Goods, from Jan. to Mar. 2014

No.	Region	Volume (-)	Value (USD)	Compared with the same period last year	
				Volume	Value
1	Guangdong	2,087,921,889	1,487,474,144	-0.5%	9.7%
2	Zhejiang	1,078,949,393	280,115,299	23.2%	20.3%
3	Jiangsu	1,134,277,293	206,780,001	79.8%	12.7%
4	Shanghai	76,568,843	79,354,166	56%	2.1%
5	Shandong	37,232,768	62,892,636	-6.9%	8.4%
6	Jiangxi	56,784,915	47,384,752	31%	6.2%
7	Fujian	106,575,571	44,884,308	-10.8%	23.2%
8	Anhui	27,607,679	41,605,005	4.8%	14.2%
9	Hebei	3,562,857,490	11,008,286	78.2%	56.8%
10	Guangxi Zhuang Autonomous Region	47,444,470	6,408,148	110.4%	55.7%

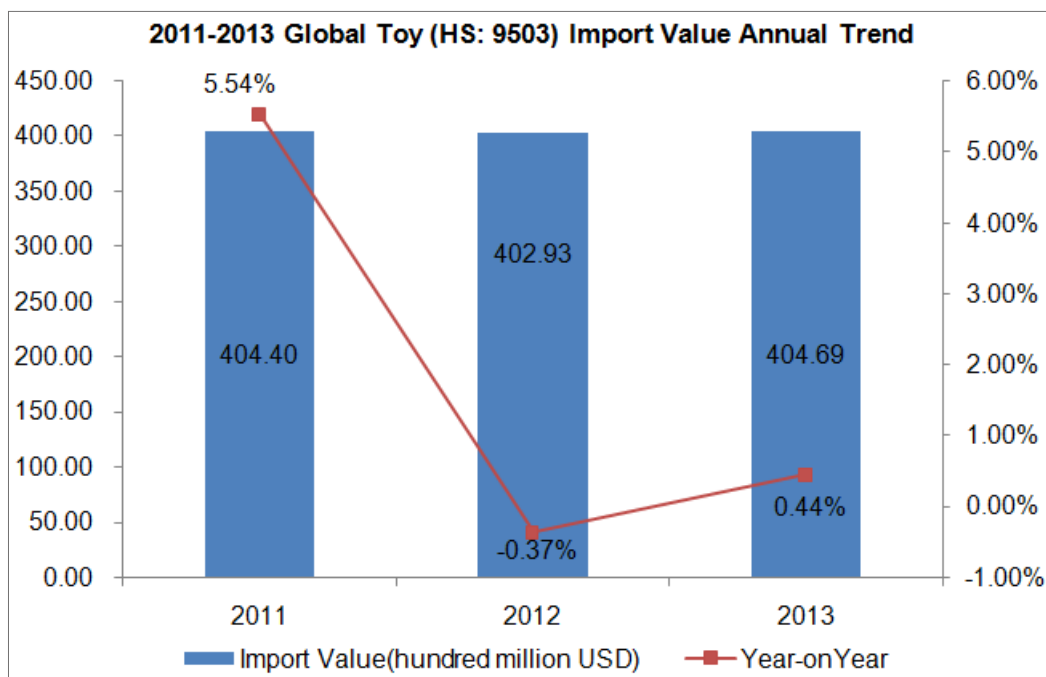
China's toys were exported mainly from Guangdong, Zhejiang and Jiangsu, from Jan. to Mar. 2014. Among which, the export value of Guangdong accounted for 65.12% of China's total export value for the product, while the export value of Zhejiang and Jiangsu accounted for 12.26% and 9.05% respectively of China's total export value for this product.

(Source: Customs Information Network)

3. Global Toy (HS: 9503) Import and Export Trend Analysis

3.1. 2011-2013 Global Toy Import Trend Analysis

3.1.1. 2011-2013 Global Toy Import Value Trend



Global import value of toys showed a V-shaped trend from 2011 to 2013, the import value for these three years amounted to 40.44 billion US dollars, 40.293 billion US dollars and 40.469 billion US dollars, while the import value of 2013 increased slightly by 0.44% compared with the same period of 2012.

3.1.2. 2011-2013 Global Toy Major Import Countries/Regions

No.	Import Countries/ Regions	Import Value (Thousand USD)			Import Value Growth Compared 2013 with 2011
		2011	2012	2013	
1	USA	11,527,881	11,545,197	11,747,167	1.90%
2	Germany	2,669,542	2,517,016	2,648,984	-0.77%
3	United Kingdom	2,765,139	2,387,736	2,492,680	-9.85%
4	Japan	1,905,208	2,089,156	1,980,887	3.97%
5	France	2,015,203	1,877,735	1,970,999	-2.19%
6	Russian Federation	990,491	1,232,337	1,427,575	44.13%
7	Canada	1,209,874	1,316,966	1,349,981	11.58%
8	Hong Kong	2,228,510	2,284,463	1,070,921	-51.94%
9	Belgium	998,403	906,080	1,069,460	7.12%
10	Italy	1,130,944	996,336	995,191	-12.00%
11	Australia	853,514	928,429	932,375	9.24%

No.	Import Countries/ Regions	Import Value (Thousand USD)			Import Value Growth Compared 2013 with 2011
		2011	2012	2013	
12	Czech Republic	762,582	794,967	903,540	18.48%
13	Netherlands	885,496	805,544	856,108	-3.32%
14	Spain	911,713	793,257	841,620	-7.69%
15	Mexico	810,379	825,465	838,658	3.49%
16	Poland	502,840	498,958	591,451	17.62%
17	Republic of Korea	407,499	475,297	561,873	37.88%
18	Austria	396,793	384,470	409,111	3.10%
19	Brazil	396,993	401,966	390,607	-1.61%
20	Turkey	419,339	369,286	373,989	-10.81%

From 2011 to 2013, the United States, Germany and the United Kingdom were the first three importing countries of global toys. Among the global top twenty toys import markets in 2013, the Russian Federation's import value of toys increased by 44.13% compared with that of 2011, for the largest increase in value.

According to the data of Russian children's toys market analysis, the scale of Russian children's toy market increased by nearly 40% from 2008 to 2012, from 664 million to 928.3 million units. During the period, Russian children's toy market was increasing year by year except 2009, the period of economic crisis, the product supply of which decreased by 17% compared with 2008. In the next few years, product supply increased by 20% equally per year. Steady growth of product supply is due to the growing demand for the products.

Children's toys launched in the Russian market are mostly imported products. From 2008 to 2012, products that foreign companies supplied to Russian market accounted for an average of 80% of total supply, while the Russian domestic products accounted for an average of 7.2%.

According to the analysis, from 2013 to 2017, imported products will continue to occupy the Russian children's toys market supplies. And in this period, the proportion of imported products will achieve an average of 77.1%. However, the proportion of domestic products will increase, for the government of the Russian Federation approved Children commodity industrial development strategy before 2020, aiming at renovating Russian children commodity market and improving the competence of Russian children products. The main goal of Russian children commodity industrial development strategy is to increase the proportion of Russian children commodity in domestic market, expand the proportion of innovative products in total exports and reduce the consumption costs of children commodity.

3.1.3. 2011-2013 Global Toy Major Import Countries/Regions Market Share

No.	Import Countries/Regions	Import Value Percentage		
		2011	2012	2013
1	USA↑	28.51%	28.65%	29.03%
2	Germany	6.60%	6.25%	6.55%
3	United Kingdom	6.84%	5.93%	6.16%
4	Japan	4.71%	5.18%	4.89%
5	France	4.98%	4.66%	4.87%
6	Russian Federation↑	2.45%	3.06%	3.53%
7	Canada↑	2.99%	3.27%	3.34%
8	Hong Kong	5.51%	5.67%	2.65%
9	Belgium	2.47%	2.25%	2.64%
10	Italy↓	2.80%	2.47%	2.46%
11	Australia	2.11%	2.30%	2.30%
12	Czech Republic↑	1.89%	1.97%	2.23%
13	Netherlands	2.19%	2.00%	2.12%
14	Spain	2.25%	1.97%	2.08%
15	Mexico↑	2.00%	2.05%	2.07%
16	Poland	1.24%	1.24%	1.46%
17	Republic of Korea↑	1.01%	1.18%	1.39%
18	Austria	0.98%	0.95%	1.01%
19	Brazil	0.98%	1.00%	0.97%
20	Turkey	1.04%	0.92%	0.92%

Note: “↑” represents that the indicators listed continued to increase from 2011 to 2013, “↓” represents that the indicators listed continued to decrease from 2011 to 2013.

Judging from the market share between 2011 and 2013, the proportion of import value for the United States, the Russian Federation, Canada, the Czech Republic, Mexico and the Republic of Korea continued to rise, while that of Italy continued to decline.

3.2. 2011-2013 Global Toy Export Trend Analysis

3.2.1. 2011-2013 Global Toy Major Export Countries/Regions

No.	Export Countries/ Regions	Export Value (Thousand USD)			Export Value Growth Compared 2013 with 2011
		2011	2012	2013	
1	China	10,827,046	11,450,207	12,386,706	14.41%
2	Czech Republic	1,777,796	2,006,343	2,351,566	32.27%
3	Germany	1,733,397	1,733,747	1,926,674	11.15%
4	USA	822,639	962,836	989,206	20.25%
5	Netherlands	790,577	729,106	799,641	1.15%
6	Belgium	712,575	644,345	796,477	11.77%
7	Mexico	638,143	769,370	745,113	16.76%
8	France	522,353	543,613	617,572	18.23%
9	United Kingdom	507,390	480,603	549,832	8.36%
10	Hong Kong	4,228,405	4,379,160	469,511	-88.90%
11	Spain	413,662	390,000	466,266	12.72%
12	Indonesia	273,259	347,068	428,967	56.98%
13	Italy	455,349	403,431	423,924	-6.90%
14	Taiwan	428,162	467,057	391,964	-8.45%
15	Viet Nam	193,712	212,346	384,006	98.24%
16	Hungary	281,769	268,171	326,254	15.79%
17	Poland	141,902	174,075	271,822	91.56%
18	Thailand	202,981	203,024	241,027	18.74%
19	Denmark	139,396	188,647	224,670	61.17%
20	Canada	232,370	241,828	224,345	-3.45%

In 2013, China, the Czech Republic and Germany were the top three largest export markets of global toys. Among the top twenty toys export markets, the export value of Vietnam toys increased by 98.24% compared with that of 2011, which had the largest increase, followed by Poland, the export value increased by 91.56% compared with that of 2011.

3.2.2. 2011-2013 Global Toy Major Export Countries/Regions Market Share

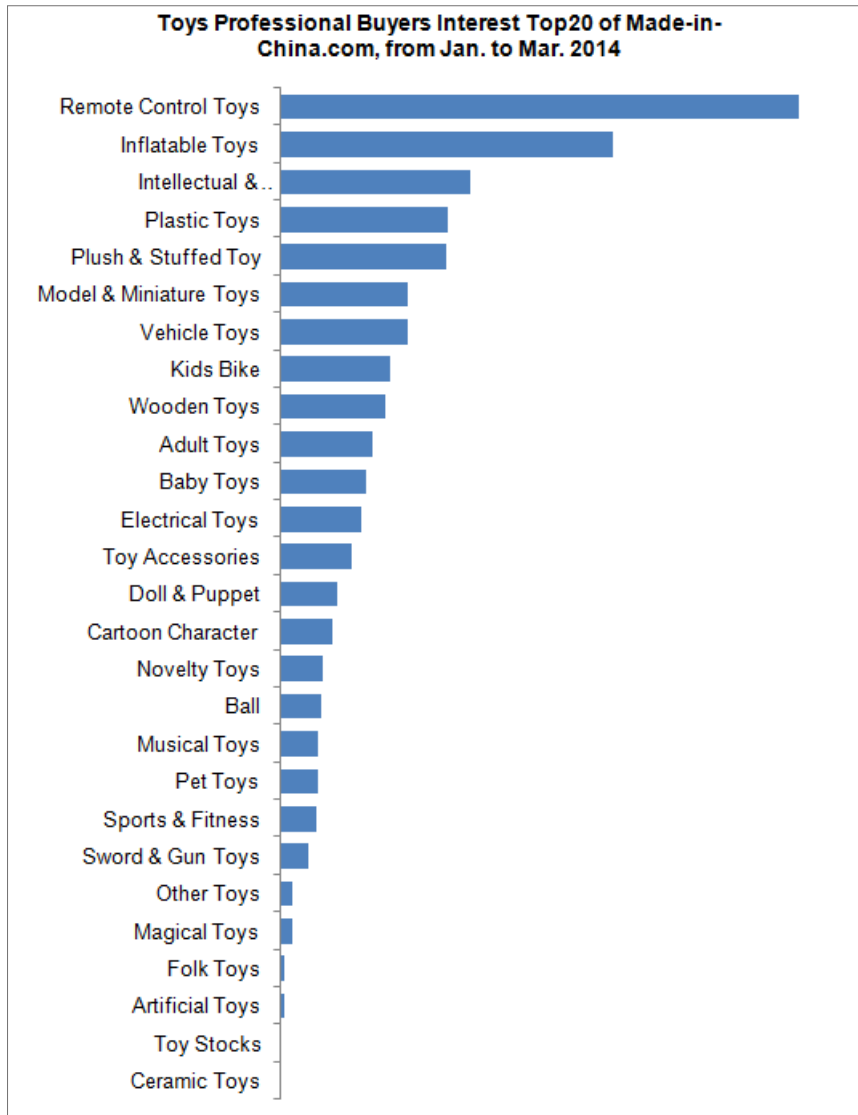
No.	Export Countries/ Regions	Export Value Percentage		
		2011	2012	2013
1	China↑	39.70%	40.14%	45.77%
2	Czech Republic↑	6.52%	7.03%	8.69%
3	Germany	6.36%	6.08%	7.12%
4	USA↑	3.02%	3.38%	3.66%
5	Netherlands	2.90%	2.56%	2.95%
6	Belgium	2.61%	2.26%	2.94%
7	Mexico↑	2.34%	2.70%	2.75%
8	France	1.92%	1.91%	2.28%
9	United Kingdom	1.86%	1.68%	2.03%
10	Hong Kong↓	15.50%	15.35%	1.73%
11	Spain	1.52%	1.37%	1.72%
12	Indonesia↑	1.00%	1.22%	1.59%
13	Italy	1.67%	1.41%	1.57%
14	Taiwan	1.57%	1.64%	1.45%
15	Viet Nam↑	0.71%	0.74%	1.42%
16	Hungary	1.03%	0.94%	1.21%
17	Poland↑	0.52%	0.61%	1.00%
18	Thailand	0.74%	0.71%	0.89%
19	Denmark↑	0.51%	0.66%	0.83%
20	Canada	0.85%	0.85%	0.83%

Note: “↑” represents that the indicators listed continued to increase from 2011 to 2013, “↓” represents that the indicators listed continued to decrease from 2011 to 2013.

Judging from the market share between 2011 and 2013, the proportion of import value for China, the Czech Republic, the United States, Mexico, Indonesia, Vietnam, Poland and Denmark continued to rise, while that of Hong Kong continued to decline.

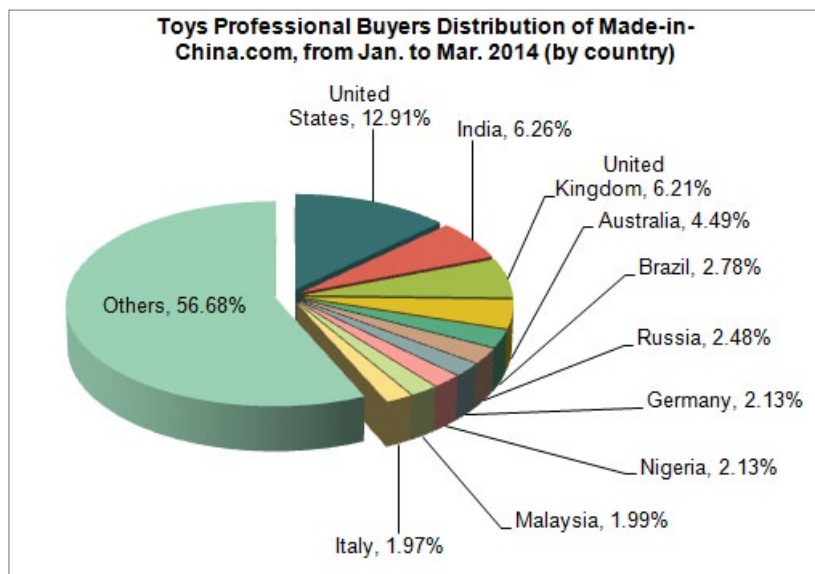
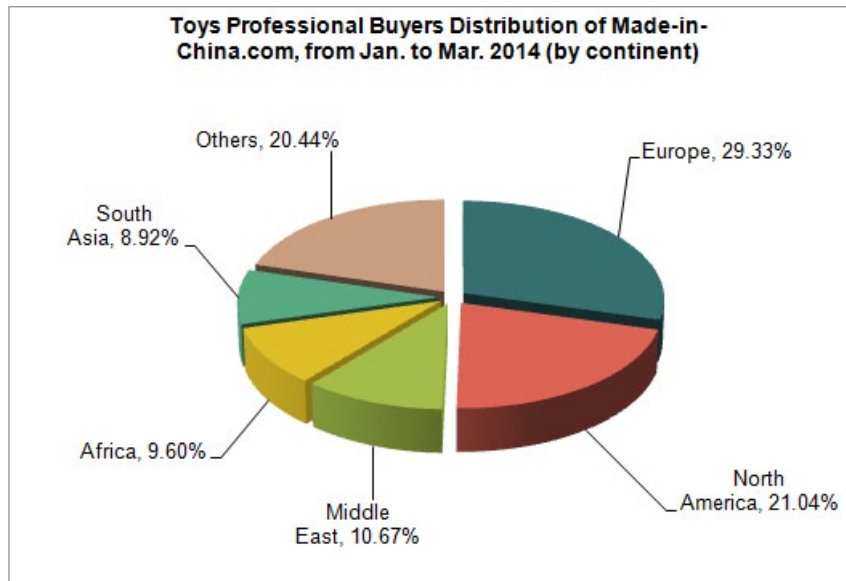
4.Toys Industry Data Analysis of Made-in-China.com

4.1. Toys Professional Buyers Interest Analysis of Made-in-China.com, from Jan. to Mar. 2014



From Jan. to Mar. 2014, according to the statistical data from Made-in-China.com, among the sub-sectors of toys, buyers pay the most attention to Remote Control Toys, followed by Inflatable Toys.

4.2. Toys Professional Buyers Distribution of Made-in-China.com, from Jan. to Mar. 2014



From Jan. to Mar. 2014, enquiries for toys on Made-in-China.com were mainly from Europe, North America, Middle East, Africa and South Asia and other regions when divided by continent.

From Jan. to Mar. 2014, enquiries for toys on Made-in-China.com were mainly from the United States, India, the United Kingdom and Australia and so on. Enquiries from the United States accounted for 12.91% of the total enquiries.

Source: Made-in-China.com

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

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