EU MARKET SURVEY 2002

TOYS AND GAMES

VOLUME II

CENTRE FOR THE PROMOTION OF IMPORTS FROM DEVELOPING COUNTRIES

EU MARKET SURVEY 2002

TOYS AND GAMES

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ProFound

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REPORT SUMMARY

This market survey profiles the EU market for toys and games. The emphasis of the survey lies on those products which are of importance to developing country suppliers. The major national markets within the EU for those products are highlighted. The survey includes contact details of importers, trade associations, and other relevant organisations. Furthermore statistical market information on consumption, production and trade, and information on trade structure and prices and margins is provided.

The main categories of toys and games included are:

- Babies' and toddlers' (pre-school) toys
- Dolls, stuffed animals, clothing and accessories
- Vehicles
- Construction toys
- Board games and puzzles
- Trains, models and hobby articles
- Video games
- Children's pre-recorded videos
- Activity toys
- Ride-ons
- Action figures
- Miscellaneous toys (books, stationery, musical instruments, outdoor games and sport games, imitation games, arts and craft games)

As an exporter you need this information to formulate your own market and product strategies. In order to assist you with this CBI has also developed a matching EU Strategic Marketing Guide *"Toys and Games"*. It offers a practical handbook for exporters engaged, or wishing to engage in exporting toys and games to the European Union. It aims to facilitate exporters in formulating their own markets and product strategies, through the provision of practical information and a methodology of analysis and ready-to-fill-in frameworks.

As mentioned above, statistical market information on consumption, production and trade, and information on trade structure and prices and margins, which is required for the ready-to-fill-in frameworks, can be found in this EU Market Survey.

Market research
This EU Market Survey and the EU Strategic Marketing Guide serve as a basis for further market research: after you have read this survey and filled in the frameworks in the strategic marketing guide it is important to further research your target markets, sales channels and potential customers.

Market research depends on secondary data (data that have been compiled and published earlier) and primary data (information that you collect yourself). An example of secondary data is this EU Market Survey. Primary data are needed when secondary data fall short of your needs, for example when researching your specific type of consumer about the acceptance of your specific product. Sources of information are among others (statistical) databanks, newspapers and magazines, market reports, (annual) reports from branch associations, but also shops in target countries, products or catalogues from your competitors, and conversations with suppliers, specialists, colleagues and even competitors.
After you have received/collected your information you should analyse it. In order to judge the attractiveness of the market, sales channel or customer you should use/develop a classification or score system.

For more detailed information on market research, reference is made to *"CBI's Export Planner 2000"*.

Consumption
The global market of toys and games amounted to nearly US$ 70 billion (€ 76 billion) in 2000.
The market has been relatively stable during the last three years. North America is the global leading market accounting for 45 percent of the global market in 2000, followed by Asia (24%) and Europe (23%). Germany, France and the United Kingdom are the main markets within Europe.

The EU market for toys is still experiencing growth, whereas EU production and export have slightly decreased. Some market segments make up for others that lose out. Growth is still experienced in the segments video games and electronic goods, while the market for other items has diminished.

Production
In 2000, total production of toys and games in the EU amounted to US$ 4,232 billion (€ 4,600 million), indicating a small decrease of 4.5 percent compared to 1999.

The EU has 2,000 companies working in the toy and game sectors, 80 percent of which has less than 50 employees. The toy industry directly employs over 100,000 people in the EU; 53,500 of these work in production, and 45,000 in research and development, marketing, sales distribution, and many other services. About 5 percent of the companies has a turnover of more than US$ 44 million. Overall calculated production cost is distributed over one third labour cost, one third material, and one third overhead and profits.

Some of the European regions in which toy companies are concentrated have their factories in the Jura, in Northeast France near the border with Germany; the province of Alicante in Spain and the Bavarian Forest in Germany.

Imports

Between 1998 and 2000, imports of toys and games by EU member countries increased by a small 3 percent in terms of US$, amounting to over US$ 10.7 billion (€ 11.6 billion) in 2000. The United Kingdom was the leading importer, accounting for 21 percent of the total imported value by EU member countries, followed by Germany (18%), France (15%), The Netherlands (12%), Belgium (8%) and Spain (8%).

Toys and games were mainly supplied by non-EU countries. In 2000, 64 percent of imports by EU member states was supplied by non-EU countries, of which almost two thirds originated in developing countries. China and Japan were the leading supplying countries, together accounting for half of the total imported value in 2000.

Exports

In 2000, the EU member states together exported about US$ 5 billion (€ 5.4 billion) of toys and games, representing a decrease by 8 percent compared to 1998. The largest exporter of toys and games in the EU was Germany, accounting for 23 percent of the total exported value by EU member countries in 2000. Other key exporting countries were The Netherlands (15%), the United Kingdom (14%), Italy (10%) and Spain (9%).

Trade structure

On a global level, trading of toys takes place within the context of a highly structured and/ or controlled supplying industry. However, there is often a German or American company behind a “Made in China” product. It is not unknown for EU toy importers to go to Asia to buy toys manufactured in a German factory. The leading toy distributors, the department stores, maintain purchasing offices in South-East Asia, especially in Hong Kong. Suppliers from South-East Asia are less prominent in central and Scandinavian countries than in the United Kingdom and France, where they amount to nearly two thirds of the supplying industry.

The most common distribution channel for developing countries has earlier been through an agent or buying organisations like the Fair Trade. Agents today are, however, more focusing on exclusivity on branded toys, like Mattell, Fischer Price, Märklin etc, for a number of reasons:

- Higher price levels, meaning higher margins
- Less problems with safety and quality
- Better marketing back-up
- More reliable supply

Therefore, exporters of toys from developing countries are becoming more dependent on organisations with a supporting approach, as well as large department stores like IKEA, Habitat etc. If an agent is chosen for distribution within the EU, he should be one with the capacity to handle/overcome the toy safety legislature in the Union.

Internet is still a channel to be proven. Attempts so far have not been very successful anywhere.
Toys in particular are also exposed to stringent quality and safety regulations, which can make it complicated to deal with in this media.

Opportunities for developing countries

At the time of a general slump in consumption, the toy industry is characterised by a mood of optimism and creativity. Industry and trade are about to face new challenges: the toy industry has to face the task of developing new products through creativity and generating impulses for the market.
The steadily decreasing birth rate and decreasing sales figures have intensified competition in the trade. Nevertheless, trade data reveal that developing country exporters have a strong position in EU imports of a number of toy products groups (stuffed animal toys, motorised sets, toy musical instruments, dolls and animal toys). Market opportunities for exporters from developing countries do exist, however, they should always keep in mind that the European toy and game market requires high quality products complying with European Safety Standards.

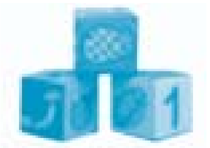
1 PRODUCT CHARACTERISTICS

1.1 Product groups

This market survey analyses the market for the most important toys and games traded within The Netherlands and major European Union markets. The main categories of toys and games are:

- Babies' and toddlers' (pre-school) toys
- Dolls, stuffed animals, clothing and accessories
- Vehicles
- Construction toys
- Board games and puzzles
- Trains, models and hobby articles
- Video games
- Children's pre-recorded videos
- Activity toys
- Ride-ons
- Action figures
- Miscellaneous toys (books, stationery, musical instruments, outdoor games and sport games, imitation games, arts and craft games)

Babies' and toddlers' toys



Babies' and toddlers' toys are toys for infants which assist in the development of sight, touch, sound, taste and smell. To stimulate this development, toys include a wide variety of textures, shapes, sounds, colours and weights. Toys for cribs and playpens include crib gyms, mobiles, music boxes and toy suspension rods. For older babies who are developing finer motor skills, eye/hand co-ordination and colour and shape recognition, popular toys include those designed for nesting, sorting and stacking and filling and dumping. Babies learning to walk use toys designed for pushing and pulling, while making pleasant sounds. Safety is crucial in the choice of toys for infants and toddlers. These toys must be smoothly finished, well-rounded and washable.

Dolls, clothing, accessories and stuffed animal toys

Dolls can be simply designed or battery-operated. The latter are usually highly promoted, expensive and gimmicky. Dolls have rooted hair, a soft, cuddly body and velcro fastenings on well-sewn, attractive, roomy and washable clothes. Dolls' houses are sturdy and accessible for play by more than one child at a time. Dolls' house furniture such as beds, high chairs, strollers, and carriages should be sturdy, well-balanced and scaled to the dolls' house.

Stuffed animal toys should also be sturdy and washable. Stuffed toys should have clearly marked washing instructions, seams should be well-sewn, eyes and noses firmly attached and clothes and accessories well-finished. Inner and outer materials should be new, clean, flame-retardant and preferably non-allergic.

Construction toys

Construction toys provide a wide variety of building elements with enough pieces to produce a satisfying result. Pieces must fit together snugly and easily and suit the age group for which it is identified, to avoid frustration and yet provide a challenge. For younger children, construction toys should be of simple design with large enough pieces for easy manipulation. Sets of wooden blocks may include a variety of shapes in related sizes, which illustrate the basic principles of proportion and dimension. An older child can manipulate smaller pieces and thus graduate to more advanced sets. Gear systems, motors and electrical components may be included or be made available in supplementary sets to extend play value. Some popular items in this category include Duplo and Lego building sets.

Board games and puzzles

Games are usually designed with clear and easy rules to follow, with flexibility to accommodate younger or less-skilled players, or a shorter playing time.
The game board are durable and the pieces must be of a suitable size and weight.

Girls' and boys' toys

In the toy trade, a categorisation distinguishing girls' from boys' toys is also frequently used. Toys specifically for girls include dolls, dolls' clothing and accessories, teenage character dolls (Barbie) and the many products which enable girls to emulate the role of career woman, model, mother and housewife.
Boys' toys include construction toys, vehicles and action figures.

However, today's reality is somewhat different where young parents are more interested in raise their children in a "unisex" way, where boys are allowed – and even encouraged – to play with dolls and girls with cars etc. This categorisation might therefore be less important in the future as young parents have a tendency to raise their children in a more "unisex way".

1.2 Customs/statistical product classification

On January 1, 1988, a unified coding system was introduced to harmonise the trading classification systems used world-wide.
This system is called the Harmonised Commodity Description System (HS) and was developed by the World Customs Organisation (WCO). The system comprises about 5,000 commodity groups, each identified by a six digit code, arranged in a legal and logical structure and is supported by well-defined rules to achieve uniform classification. The system is used by more than 177 countries and economies as a basis for their Customs tariffs and for the collection of international trade statistics.

WCO is currently introducing alterations to the HS and these will be included in the combined nomenclature as of January 1, 2002.

After the six-digit code, countries are free to use further subheadings. An 8-digit system is used in the trade data of Eurostat. Most codes, however, end with two zeros, i.e. effectively only using 6 digits. In some countries even 10 digits are occasionally used.

Table 1.1 gives the six-digit list of the main groups of HS codes for toys and games. The varieties of toys and games discussed in this report are covered by Chapter 95 of the Harmonised System.
The main categories as used in the report are:

It should be noted that the product groups mentioned in section 1.1 are differently structured than the above mentioned product groups which follow the HS. Chapter 3 and Chapter 4 follow the structure dealt with in section 1.1, while Chapters 5 and 6 follow the HS categories.

The trade statistics make finer distinctions, differentiating not only by product but also by raw material content. Plastic, wood, metal, textile and rubber items are separately identified.

Table 1.1 HS code classification of toys and games

HS codes	Product group	Referred to as:
95 01 00	Wheeled toys designed to be ridden by children	wheeled toys
95 02 10	Dolls representing only human beings	dolls
95 02 91	Garments and accessories, footwear and headgear for dolls	
95 02 99	Parts and accessories for dolls representing only human beings	
95 03 10	Electric trains, including tracks, signals and other accessories	electric trains
95 03 20	Reduced size "scale" model assembly kits, whether or not working models (excl. 9503.10)	model assembly kits
95 03 30	Construction sets and constructional toys (excl. 9503.10 to 9503.20)	construction toys
95 03 41	Stuffed toys representing animals or non-human creatures stuffed	stuffed animal toys
95 03 49	Toys representing animals or non-human creatures (excl. stuffed)	animal toys
95 03 50	Toy musical instruments and apparatus	toy musical instruments
95 03 60	Puzzles	puzzles
95 03 70	Toys, put up in sets or outfits (excl. 9503.10 to 9503.50)	toys in sets
95 03 80	Toys and models incorporating a motor (excl. 9503.10 and 9503.20)	motorised toys
95 03 90	Other toys (excl. 9503.10 to 9503.80)	miscellaneous toys
95 04 10	Video games of a kind used with a television receiver	video games
95 04 20	Articles and accessories for billiards	articles for billiards
95 04 30	Other games, coin- or disc-operated, other than bowling alley equipment	games operated by coins
95 04 40	Playing cards	playing cards
95 04 90	Other games	other games

2 INTRODUCTION TO THE EU MARKET

The European Union (EU) is the current name for the former European Community. Since 1 January 1995, the EU has consisted of 15 member states.
Negotiations are in progress with a number of candidate member states, many of which already have extensive trade and co-operation agreements with the EU.
It is envisaged that five of these countries will become members in 2004.

According to the first demographic estimates for 2001, published on January 11, 2002 by Eurostat, the population of the EU on 1 January 2001 was expected to total 379.4 million. While the pace of population growth in the EU has slowed greatly in the last 30 years, the increase of 0.4% in 2001 was slightly higher than the figure in recent years.
Total GDP in 2000 equalled US$ 7,856.6 billion (€ 8,827.6 billion) at current prices, while the average GDP per capita (at current exchange rates) amounted to US$ 20,759 (€ 23,325) in 2000 (OECD, 2002).

The most important aspect of the process of unification (of the former EC countries) which affects trade is the harmonisation of rules in the EU countries.
As the unification allows free movement of capital, goods, services and people, the internal borders have been removed. Goods produced or imported into one member state can be moved around between the other member states without restrictions. A precondition for this free movement is uniformity in the rules and regulations concerning locally produced or imported products. Although the European Union is already a fact, the regulations have not yet all been harmonised. Work is in progress on uniform regulations in the fields of environmental pollution, health, safety, quality and education.

On January 1, 2002 the euro (€) became the legal currency used in 12 EU member states.

It had already been in use since 1 January 1999, by banks as legal currency in eleven EU member states: Austria, Belgium, Finland, France, Germany, Italy, Ireland, Luxembourg, The Netherlands, Spain and Portugal. Greece joined the Economic and Monetary Union (EMU) on 1 January 2001.

The most recent Eurostat trade statistics quoted in this survey are from the year 2000. In 1998, the European Currency Unit (ECU) was still used as a monetary instrument by financial institutions to simplify financial procedures. On 1 January 1999, statistical and contractual values in ECU were converted into euros on a 1:1 exchange rate. The € / US$ exchange rate currently (August 2002) stands at around US$ 0.98 for one euro.
The US$ is the basic currency unit used to indicate value in this market survey.

The Eurostat trade statistics are based on the € values and transferred into US$ with the exchange rates presented below.

Trade figures quoted in this survey must be interpreted and used with extreme caution. The collection of data regarding trade flows has become more difficult since the establishment of the single market on 1 January 1993. Until that date, trade was registered by means of compulsory Customs procedures at border crossings, but, since the removal of the intra-EU borders, this is no longer the case. Statistical bodies like Eurostat cannot now depend on the automatic generation of trade figures. In the case of intra-EU trade, statistical

Exchange rates of EU currencies in US$

Country	Currency	1997	1998	1999	2000	2001	August 2002
European Union	ECU	1.13	1.12	–	–	–	–
	€	–	–	1.06	0.92	0.89	0.98
Denmark	DKr	0.15	0.15	0.13	0.12	0.12	0.13
Sweden	SKr	0.13	0.13	0.12	0.11	0.10	0.11
United Kingdom	GB£	1.64	1.66	1.62	1.51	1.45	1.53

Source: CBS Statline (September 2002)

reporting is only compulsory for exporting and importing firms whose trade exceeds a certain annual value. The threshold varies considerably from country to country, but it is typically about € 100,000.
As a consequence, although figures for trade between the EU and the rest of the world are accurately represented, trade within the EU is generally underestimated.

This survey profiles the EU market for toys and games. The emphasis of the survey lies on those products which are of importance to developing country suppliers. The major national markets within the EU for those products are highlighted. The survey includes contact details of importers, trade associations, and other relevant organisations. Furthermore statistical market information on consumption, production and trade, and information on trade structure and prices and margins is provided.

Markets of selected EU countries are highlighted since their markets are relatively more important than the markets of other EU countries (in terms of production, consumption, imports and exports).
This survey focuses mainly on the UK, Germany, France, Spain and The Netherlands.

3 CONSUMPTION

Different statistical sources use different product groups or specifications. This places limitations on in-depth interpretation of trade figures and of the possible relationships between import figures and production and consumption data.

3.1 Market size

The global market of toys and games amounted to nearly US$ 70 billion in 2000. The market has been relatively stable during the last three years.
North America is the world's leading market accounting for 45 percent of the global market in 2000, followed by Asia (24%) and Europe (23%).
Germany, France and the United Kingdom are the main markets within Europe.

The toys and games market in the major EU countries represented a difficult operating environment during 1999 and 2001, with manufacturing competing for a decreasing consumer base. Nevertheless, sales growth was positive in all countries, due to clever marketing which expands sales by targeting adults instead of kids.

Toy sales to consumers display a very pronounced seasonal peak. Among EU countries this general finding differs from North to South, according to the climate and traditions and related festivities. Approximately half of the annual turnover is concentrated in the two months before Christmas.

Another peak occurs around May. In addition, the great seasonal differences in Scandinavian countries should be taken into account when trading in toys and games. In these countries there is a well-defined season for outdoor games in spring and summer (from April to September) while indoor games and toys entirely dominate autumn and winter sales.
The holiday season also influences purchasing activities. During summer holidays (July and August) people usually go elsewhere and may want, like their children, toys and games to divert themselves with.
Clearly fashion also determines the consumer's behaviour and therefore is a factor of importance with which an exporter should be acquainted.
Please refer to trade press for fashion updates (contact details in Appendix 6).

Readers of trade magazines are toy retailers in Europe. Hence, these magazine feature the latest news, views, products and figures from the industry's leading manufacturers and toy companies.
Those leading manufacturers determine the market to a large extent. Advertisements are increasingly being placed on Internet.

As shown by Table 3.2, the UK, Germany, France and Italy are the largest markets for toys and games. Germany experienced a sharp decrease by 36 percent between 1999 and 2001.

Table 3.1 Key figures of the global toy and games market, 1998-2000

	sales US$ million			child population million, 2000	average expenditure per child US$, 2000
	1998	1999	2000		
North America	28,731	31,291	30,949	67	328
Asia	17,971	17,179	16,942	1,038	13
Europe*	17,137	17,010	16,059	126	100
Latin & South America	2,808	2,755	2,768	165	15
Oceania	1,385	1,458	1,370	6	187
Middle East	1,040	1,045	972	3	243
Africa	379	350	433	253	2
World	**69,451**	**71,088**	**69,493**	**1,658**	**32**

Source: ICTI (2001)

* Europe includes East European countries

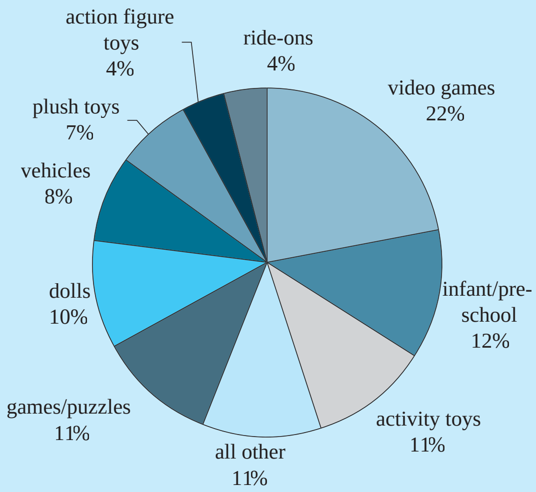
Table 3.2 EU market for toys and games, by selected country, 1999-2001
US$ million

	1999	2000	2001	% change 99-01
UK	4,985	5,272	5,220	2%
Germany	4,483	4,045	2,848	- 36%
France	3,257	3,087	3,026	- 7%
Italy	2,017	1,932	n.a	- 4% (*)
Spain	1,108	1,060	n.a	- 4% (*)
The Netherlands	702	626	572	- 19%

Source: Euromonitor (November 2001) *n.a. means not available, (*) % change 99-00*

The UK market registered the highest sales, reaching more than US$ 5 billion in 2001. The market for video games remains the leading sub-sector, with a market share of 22 percent in 2000.

Figure 3.1 EU total toy sales by product category, 2000
% of value



Source: ICTI (2001)

Toys and games represented a mature market which was characterised by an immense product variety and diversity of trends. In fact, trends and innovation represented the major driving forces of the toy industry. The toy market mirrored today's lifestyle as formed by media, advertising and the prevailing computer culture, therefore, this lifestyle was carried over to toys, which in turn speeded up innovation and noticeably shortened products' lifecycles. Consequently, average product cycles became increasingly shorter and generally did not span over more than three years. In particular, electronic toys speed up the rate of innovation in this market.

Germany

The market for toys and games in Germany was worth US$ 2.8 billion (€ 3.2 billion) in 2001. Further value expansion in the market was somewhat hampered by a gradual decline in the number of children aged 0 to 14 years since 1996. Besides the progressively decreasing share of the German child population, the main target audience for toys and games, sales opportunities were additionally diminished by a shorter time span in which children actually played with toys. Consequently, manufacturers had to compete for a customer base which was becoming increasingly smaller, but also purchased toys over a shorter period of years.
German children, just like their parents, became far more design conscious in every aspect of their lives. Furthermore, a globalisation brought about by the ever-increasing media presence in today's children's lives, also meant that youngsters became far more brand literate. As a result of the growing sophistication in taste from an even younger age onward, toys had to compete with labelled clothes, trainers, entertainment electronics, computers and music CDs on children's wish lists. Traditional toys and games were hit hardest by the transfer of expenditure to other markets.
While console and computer games faced some competition from other consumer goods, the growing presence of PCs in German households actually boosted demand for computer games.

During the last few years German parents were willing to spend more on toys and games, despite the uncertainty of the economic future. The reason for this was that more Germans put off having children until much later in life compared to generations before them.
Those older parents frequently tended to be at the peak of their careers and more affluent and therefore could afford to indulge their offspring. At the same time, there was a higher incidence of both parents working, sharing a combined double income. Yet, with more women in the workplace, parents generally tended to have less free time for their children.

As a result, many parents obviously felt intensely guilty about the lack of time and attention they could give their children and sought to compensate for this with money or toys.

Traditional toys and games represented the largest sector of the market in value terms, accounting for 57 percent of current sales in 2000. Computer console games gradually eroded the dominance of the traditional toys and games sector, with share up by 12 percent. Performance by the traditional toys and games sector was impacted by a gradual decline in both size of the child population and reduction in the average number of years German children would primarily consume toys. This was offset by greater usership of many toys in line with a general trend towards a more “playful” culture.

The fastest growing product categories were computer games, which benefited from increasing PC ownership and growing adult usership. Also soft/plush toys witnessed high growth rate due to the launch of intelligent toys such as Furbies and popular licences such as Teletubbies and Pokémon. The market share of intelligent toys increased to 10 percent of the traditional toys sales in 2000.

Euromonitor predicts an overall value growth in constant terms of 19 percent over the 2001-2005 period for toys and games market. The continuing decline in birth rates and growing sophistication among German children will hamper future value expansion for traditional toys and games. Hence, this market sector is set to witness near stagnation with a small 0.7 percent increase in constant sales over the forecast period. By contrast, consoles and computer games are expected to increase by 44 percent, led by the emergence of next generation consoles.

United Kingdom

The market for toys and games in the UK reached US$ 5.2 billion (€ 5.8 billion) in 2001, indicating an increase of almost 3 percent compared to the previous year. UK consumers spent more on toys and games than any other EU country, both as a nation and per head of population. Per capita expenditure amounted to US$ 126 (€ 142) on toys in 2001. Euromonitor has forecasted that the UK market for toys and games will grow by over 14 percent, reaching a value of more than US$ 5.8 billion in 2006.

Traditional toys and games suffered from the rapidly rising sophistication of UK children, who turned their backs on traditional toys from an increasingly early age. The near stagnation in the size of the UK child population since 1996 did not help to revive failing sales either. Besides the considerable shortening of the average child’s toy buying “life span” to below 10 years, UK children turned their attention away from toy merchandise to other consumer markets from a much earlier age than previous child generations.

In 2001, the computer games sector was the largest UK toys and games market with 25 percent of sales in 2001, equivalent to US$ 1,288 million (€ 1,447 million). The success of the computer and console games sector not only occurs at the expense of traditional toys due to youngsters turning their back on the latter products, but also due to its major role among adults. The increase in household penetration of personal computers had a direct effect on computer games sales, as it raised awareness of the technology and advanced games to be found in this sector.
The computer games sector is expected to continue to be the largest in the UK toys and games market, amounting to almost US$ 1.6 billion (€ 1.8 billion) in 2006. Major manufacturers within this market segment are Nintendo, Electronic Arts and Sony.

However, the traditional toy sector also managed to avoid important sales losses by the huge amount of product innovation throughout the review period.
Yet, the speed of innovation also led to a noticeably shorter product life span for most toys, to just around three years on average.

Other important product groups were infant/pre-school, dolls and doll’s accessories. Action figures and building construction showed the largest growth in 2001, while infant and pre-school toys continue to sell well.
Many of these products have been on the market for years, but by re-styling (or new accessories), they keep on selling and remain in the top 10 of toys sold.

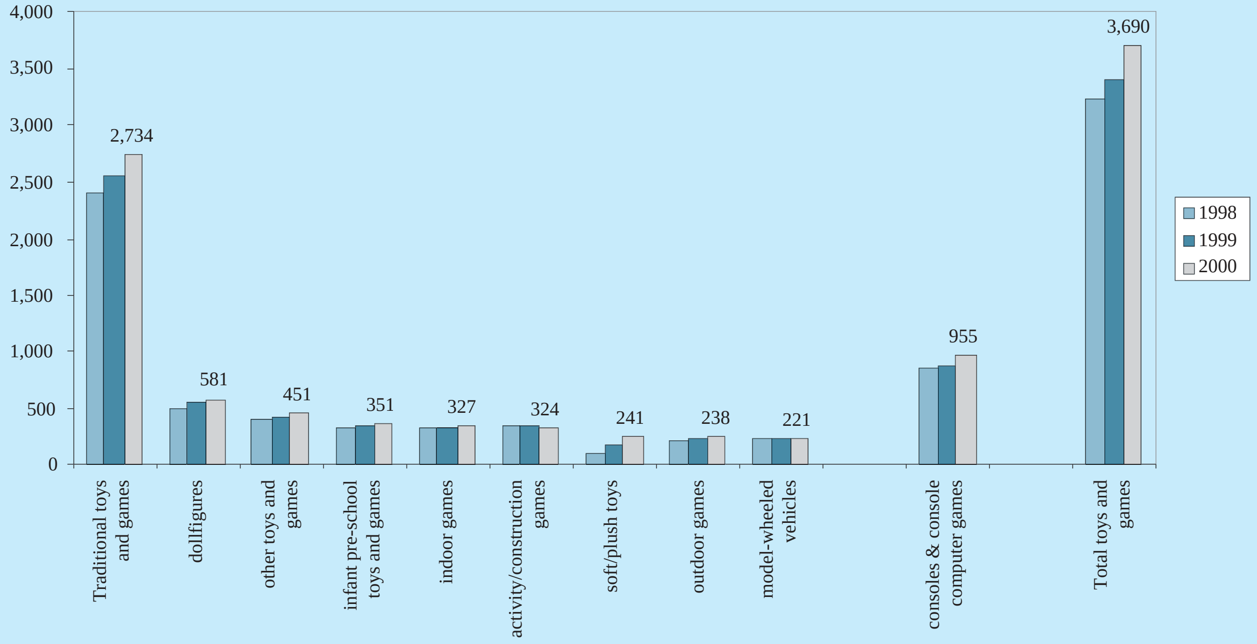
Hasbro remains the market leader in the traditional toys and games sector, enjoying a 9 percent share of the total market against a market share of just 6 percent and 2 percent for the next largest manufacturers, Mattel and Lego respectively.

France

The total French market for toys and games was worth US$ 3.0 billion (€ 3.2 billion) in 2000, representing a healthy increase of 8.2 percent compared to the previous year. Euromonitor reported that the market was worth € 3.4 billion in 2001. Per capita expenditure (€ 57.1 in 2001) keeps growing but 2001 marked the lowest growth rate between 2000 and 2001.

The economic and social environment in France has favoured the development of toys and games.
Traditional toys grew faster than consoles and computer games between 1998 and 2000, registering 15 percent growth compared to 13 percent for the console and

Figure 3.2 Value sales of the French toys and games by sector, 1998-2000
US$ million



Source: Euromonitor (October 2001)

computer games sector. Value-added interactive and electronic toys fuelled growth for traditional toys. However, consoles and computer games remain by far the biggest sector, even though their share decreased slightly to 28.5 percent with a value of € 966 million in 2001.

Most intelligent toys can be found in the plush toys and dolls/ figures sub-sector. Although intelligent plush toys may be less soft and cuddly than their traditional counterparts, children see them as demonstrating more genuine affection, whereas the dolls are simply more realistic human replicas. V-Tech, considered the leader in educational electronic toys with around 75 percent of the market, emphasises the educational capacity of interactive toys, in the same way as Fisher Price.
In 2000, V-Tech launched the Singe Malin (clever monkey) and the singing, talking Mon Chien Calin (my cuddly dog), which can be hung on the site of a cot and is responsive to sound, light and touch.
Other toys equipped with sensors such as Hasbro's Mon Petit Poney, which reacts to being stroked, and Star Wars robot which protests when its legs or arms are removed, have primarily entertainment functions.
Clearly, intelligent toys are a crucial part of the traditional toys and games sector, accounting for almost 16 percent in 2000. These toys also have much market potential since technology is advancing every year, making more innovative designs possible.

Intelligent concepts have developed since the introduction of the Tamagotchi in 1997, and such technology is today applied to increasingly complex and large games and toys, which are more costly. Manufacturers are expected to continue to be keen to develop intelligent toys as they are comparatively expensive products which are adding value to the market. Such toys also represent an instrument for traditional products to compete effectively with consoles and computer games, as children become more aware of technology and pull away from classic toys.
In general, the most important trend in the traditional toys and games sector is the development of interactive products and intelligent toys. The latter are expected to represent 21.5 percent of the sector by 2005.
The traditional toys and games remain extremely popular, as many parents consider these an instrument for stimulating their child's imagination and creativity.
Licensed products have become increasingly important in the soft/plush toys and dolls/figures sub-sectors, stimulating value growth.

Spain

The Spanish market for toys and games showed strong growth, boosted by a healthy economic climate which encouraged higher spending on non-necessities, including toys. Sales increased by 88 percent, amounting to US$ 1.1 billion (€ 1.2 million) in 2000.

To some extent, these positive trends were offset by the slowing birth rate, which led to a shrinking consumer base. This was further deteriorated as children stopped playing with toys at an earlier age. Sales of traditional toys and games increased by 6 percent in 2000, led by demand for quality products. However, this was clearly outperformed by the much more dynamic growth of 22 percent in consoles and computer games, due to the introduction of next generation consoles and increased household penetration by computers.

Dolls and figures represented the largest sub-sector in traditional toys and games, accounting for almost 27 percent of the total sector sales. The fastest growth in traditional toys and games occurred in infant/pre-school toys, up by 97 percent compared to 1996, as parents opted to purchase top brands for their children. Growth in the market was supported by strong interest in intelligent toys, especially the Furby. This has led to the development of intelligent toys in most traditional toy sectors. The leading players in the toys and games market include Sony, Nintendo and Famosa.
Euromonitor predicts strong growth for toys and games as a result of sustained economic growth, and the increasing penetration of consoles and computer games. The sales of console games will increase by 205 percent over the 2000-2005 period to total US$ 403 million (€ 438 million).

The console games sub-sector will increase its share of the sector to account for almost 36 percent of sectoral value by 2005, 2.1 percentage points behind computer games.

Euromonitor predicts that the market share of intelligent toys will be increased between 2002 and 2005, to 16 percent of traditional toys and games by the end of the forecast period.

The Netherlands

In 2001, consumer expenditure on toys and games (excluding videos for children) in The Netherlands amounted to US$ 626 million (€ 681 million), indicating an increase of 6 percent compared to the previous year. The increase could also be found in the economic development which made it possible for consumers to spend money on more expensive toys and games. Other toys and games which are popular are Digimon, aluminium scooters, and the complex game called “magic” due to the success of Pokémon cards.

Currently, Mattel is heavily marketing products related to the movie Harry Potter. Even so, the trade is not very enthusiastic about the hype around Harry Potter. Products regarding the movie The Lord of the Rings are expected to be popular in 2002. The movie was introduced during the second half of 2002, about 200 thousand videos samples were sold in The Netherlands and more than 1.3 million samples were sold in the UK on the first day.
In April 2001, Nintendo introduced two new products for its Game Boy, namely Pokémon Gold and Silver. The company expected to sell 160,000 of these two games in the first 8 weeks after the introduction, indicating the still very high demand for these video games. While demand for construction toys K’nex seems to have decreased, construction toys (K’nex and Lego) are among the nominations for the Toys of the Year 2002 contest.

Table 3.3 Value sales of the Spanish toys and games by sub-sector, 2000 and 2005 US$ and € million

	2000		2005		
	US$	€	US$	€	change 00-05
Consoles/console games and computer games	403	371	426	392	6%
Dolls/figures	177	192	283	307	60%
Activity/construction games	81	88	138	150	70%
Indoor games	117	127	152	165	30%
Infant/Pre-school toys and games	36	39	71	77	96%
Model-wheeled vehicles	88	96	128	139	45%
Soft/plush toys	62	67	83	91	35%
Outdoor games	75	81	123	134	65%
Other toys and games	22	24	23	24	3%
Total	**1,060**	**1,152**	**1,426**	**1,550**	**35%**

Source: Euromonitor (2002)

Another hit, following the popular TV quiz Weekend Millionaires, is the Jumbo game by the same name.

3.2 Market segmentation

The most significant segments of the EU toy market in terms of consumer sales are electronic games (hardware consoles and games) and pre-recorded videos for children. In the initial period of expansion of these two sectors from 1989 to 1992, it was feared that sales of 'old-fashioned' board games and puzzles and other traditional toys might decline irreversibly, but this has not occurred. Expenditure on model trains, railways, accessories, hobby and creative articles have, however, fallen.

In the Netherlands market, international brands account for over half of total toy sales. The most significant of them are Lego, Mattel/Fisher Price, Hasbro, with its Kenner Parker Tonka, Playskool and MB divisions, and Nintendo and Sega, which dominate the games computer market. The only Netherlands brand of real importance is Jumbo, featuring a wide range of board games and puzzles produced by Koninklijke Hausemann en Hötte NV.

International brands with significant shares in specific product sectors include:

❑ *Babies' and toddlers' toys*	Fisher Price, Ambi, Playskool, Tomy, Duplo *(Lego)*
❑ *Girls' toys*	Barbie (Mattel), Sindy (Hasbro)
❑ *Boys' toys*	Hasbro
❑ *Construction toys*	Lego, Lego Technic, Playmobil
❑ *Board games and puzzles*	Hasbro (MB, Parker), Jumbo, Ravensburger, Selecta
❑ *Electric trains*	Märklin, Fleischman
❑ *Computer games*	Nintendo, Sega

Segmentation by products

The following sections examine developments in the key market sectors:

- Games computers and games (video games);
- Soft/plush toys;
- Children's videos;
- Babies' and toddlers' toys;
- Boys' and girls' toys;
- Board games and puzzles;
- Trains, models and hobby articles;
- outdoor games.

Games computers and games

About 22 percent of total consumer spending on toys and games in the EU is devoted to games computer-consoles (hand-held and table-top) and computer games.

More than three-quarters of young people between the ages of 8 and 24 years play computer games.
Older children, who moved away from traditional toys and games to other competitive interests, have again become customers for the toy trade with the arrival of games computers. Moreover, the age at which children start to play with games computers and other electronic games is continuously dropping.

In 2000, the UK was the leading consuming country of consoles and consoles/computer games, accounting for 50 percent. This was in contrast to France, where traditional toys still play an important role and there is more resistance to changes in play patterns.

While consoles and computer games increased their shares of the total market in all countries, nowhere was this more pronounced than in Italy, where the share for consoles and computer games increased from a tiny 12 percent in 1996 to 40 percent by 2000.

As shown in Table 3.4, compared to the 1998 situation, the growth of the Italian market for consoles and computer games slightly decreased in 2000.

The launch of Play Station was the main impetus for growth, bolstered by other launches such as N64, Dreamcast and Play Station 2. Growth was also strong in the UK, where both console and computer games proved attractive for young children and adults alike.
In contrast to the rising costs of CD-ROM games, retail prices for PC CD-ROM titles have come under pressure mainly as a result of pricing competition between software retailing chains.
The mixing of traditional toys with modern electronics such as computers and video games has become increasingly popular. An example is Lego's Mindstorms CD that allows children to design robots on a computer and then build them with Lego plastic bricks. Hasbros most popular board game Monopoly as well as the favourite word game Scrabble are now also available on CD and can even be played on-line.
Mattel's Barbie doll is keeping in step by allowing girls to use their computers to programme and personalise their Barbie doll and design, create and play using Barbie software. The lines separating computers, video games, Internet and toys have become blurred, so that it is increasingly difficult to tell whether the product is a toy or a multimedia product.

Table 3.4	Sales of consoles and computer games by selected EU countries, 1998-2000 US$ million					
	1998	1999	2000	1999	2000	change 98/00
	US$ million			€ million		
France	2,262	2,312	2,649	2,181	2,879	17%
Germany	1,859	1,879	1,732	1,773	1,883	-7%
Spain	605	708	768	668	835	27%
UK	343	384	411	362	447	20%

Source: Euromonitor (2001)

Note: Figures for The Netherlands are not available.

Soft/plush toys
Soft/plush toys represented an important sub-sector in many markets accounting for more than 10 percent of total traditional toys and sales in Germany and the UK. As classic toys for young children and gifts for adults, the category was also revived by the introduction of licensed toys, interactive toys and hit products such as Furby. The sub-sector, however, was much less important in most Latin culture markets, including Spain, Italy and France.

Children's videos
This market segment has only emerged in the EU since the end of the 1980s. Before the 1990s, people with a video recorder tended to hire a cassette for the children to view a particular film, but, because many children like to watch their favourites again and again, the market has reacted to the opportunity by promoting a large number of popular films for sale.

Nowadays, films are increasingly incorporated in DVD technology, which is more advanced, though more expensive than videos. Walt Disney's videos continue to be strong in this market segment.

Babies' and toddlers' toys
The sector encompasses a huge variety of products, ranging from rattles to mobiles, activity centres, building blocks, bath toys, soft toys, wooden toys, teddy bears, dolls, musical instruments, toy vehicles, babywalkers and tricycles. In many countries, this sector was a minor sub-sector. In Spain, they accounted for just almost 6 percent of total sub-sector sales, compared to a high of 16 percent in the UK. Attitudes towards the importance of these toys differ widely according to culture. In Spain, for example, there is little acceptance of the concept of toys as an educational tool. Instead, toys are seen primarily as playthings to amuse an infant. Therefore, their importance is lessened, and parents prefer to spend time interacting with their child than leaving them to play. This differs strongly from countries such as the UK, where infant toys are seen as a critical method of stimulating early development, a concept underlined by the importance of top infant toy retailer, the Early Learning Centre, whose brand clearly reinforces this belief.

Branded toys dominate sales in this sector. The major brands on sale are Mattel/Fisher Price, Duplo (Lego), Tomy, Playskool and Ambi. In general, licensed characters, such as Mickey Mouse, Nijntje (Dick Bruna/ Sega Toys), figures from Sesame Street (Tyco), Winnie the Pooh, Teletubbies, Pokemon, and Looney Tunes are very popular.

The major influences on purchasing are safety, play value and environmental considerations.

Table 3.5	Sales of soft/plush toys by selected countries, 1998-2000 US$ million						
	1998	1999	2000	1999	2000	change 98-00	% of total traditional toys and games (2000)
	US$ million			€ million			
UK	217.7	296.7	280.7	280	305	29%	10.7
Germany	199.7	284.8	250.5	269	272	25%	10.8
France	93.2	150.6	201.7	142	219	116%	8.8
Spain	77	79.5	62.9	75	68	- 18%	9.4

Source: Euromonitor (November 2001)

Note: Figures for The Netherlands are not available.

The importance of safety is an added incentive for consumers to buy well known promoted brands.
The educational value of toys is now being stressed even in toys for the youngest children.
In this segment, price, though still important, is a less influencing factor on spending behaviour.

Major brands are less dominant in the trade for soft toys and wooden toys. The key considerations for a consumer buying a soft toy for a child include attractiveness, softness, safety, washability and price. Three main types are sold:

Classic toys:	well known animals, theme toys and cartoon characters;
Baby ranges:	featuring pastel colours and the animal types which are most popular with very small children, such as bears, pussy cats, bunny rabbits, dogs, ducks etc.; and
Collectors' items:	more authentic looking animals, original or funny looking characters.

It has been estimated that the EU market for pre-school toys, that is for children from 0 to 4 years old, accounts for 11 percent of the total toy and games market. Traditionally, many wooden toys used to be manufactured in the EU, especially in The Netherlands.

This is no longer the case and wooden toys now account for a very small share of the market in The Netherlands. Nevertheless, their position is probably more significant than in other EU markets. Until the early 1990s, wooden toys were sourced at very low prices from Eastern Europe. The collapse of communism and the move to capitalism have undermined the competitive edge that factories there had because of politically-set low prices. At present, there is good, if small, demand for high quality wooden toys. There seems to be a shortage of supply of reasonably priced well made quality wooden toys. Current sources include China and India, but trade sources have indicated that they would be interested in better quality products than those currently being supplied.

Boys' and girls' toys
A key characteristic of toys for boys and girls in the 1990s is that manufacturers provide the toys with such an array of features and capabilities that children need to use little of their own imagination or creativity in their play activities. In general, girls like to play in a dream and fantasy world where caring, prettiness and quiet play are important. In contrast, boys play in an action world where speed, toughness, action, daring and building are important.

In the segment of dolls and accessories for small girls, major brands are not very significant. It is most important that dolls have lifelike features and capabilities such as laughing, crying, sucking, kissing and all sorts of movement of limbs. The range of character dolls with varying nationalities, skin colours, occupations and corresponding clothing and accessories continually expands.

The sector of teenage dolls and accessories is large and dominated by Barbie. Every year, new features, wardrobes and careers as well as equipment for their fantasy lives are added to the ranges. Beyond these major brands, sales are limited to cheap imitation products and accessories.

Boys action figures is a strong sector. Sales are strongly promoted by the comprehensive merchandising of characters and the action world in which they 'live'. Recently, the most popular figures have been Spiderman, Action Man, Batman, Power Rangers and Star Wars.

For boys, the segment of construction toys and cars and other vehicles are both significant.

The key brands are Lego and Playmobil. The former has a dominant position in the market as it covers the 'play' life of the child, from Duplo through Lego to Lego Technic. Playmobil, on the other hand, has a shorter 'play' life.

Consumer interest in cars and other vehicles is solid and continuing. The sector includes battery cars, die-cast vehicles, racing tracks and garages, radio-controlled cars, model cars and collectors' items. Boys are always looking for speed and new gimics, bringing about continual product development and introduction of new items. Major brands include Matchbox and Majorette.

Board games and puzzles
The EU market for board games and puzzles has experienced steady development in the last few years. In the 1980s the sector was in decline because of competition from television, video and electronic games, combined with the tendency for individuals to spend less time together at home in groups. There are now signs of a reversal in this trend. People generally have more free time, they are keen to use this time constructively and if possible educationally, and they attach a higher value to the 'cocoon' atmosphere of the home. In some EU countries, such as The Netherlands and Belgium, families have traditionally played a lot of board games (though puzzles are not very popular) and there is now growing interest in renewed versions of old favourite games.

Sales of traditional games and puzzles are not thought to be adversely affected by the popularity of computer games.

The Netherlands, together with the Flemish speaking part of Belgium, constitutes a rather small market for Dutch language games (about 20 million) people, so many international games are not developed in the language.

The most successfully sold games are Trivial Pursuit, Monopoly, Rummikub, Pictionary, and Risk. In autumn 2002, Hasbro will introduce board games of MB and Parker such as Dance Mania, Lie Detector, Monopoly Disney and 4-in-one-row 3D.

A number of major brands in the market for board games and puzzles are Jumbo, MB, Parker, Goliath, Ravensburger, Hasbro, Drumond Park and Character games. Travel versions of popular games and junior versions have a significant place in the market. Licensed characters, especially Disney ones, play an important part in the promotion of the latter.

Trains, models and hobby articles

Model-wheeled vehicles, while a minor area in the UK and France, were an important sub-sector in Germany, where they accounted for over 16 percent of total sub-sector sales. Here, products such as die cast cars and train sets were popular with adult collectors as well as children, and were regarded as a standard toy owned by most young boys.

Compared to their German and British counterparts, Dutch people are less keen on creative hobbies and interests. The hobby of model trains is relatively expensive and the average age of real hobbyists is rising. Fewer young boys are becoming interested, partly because of the high costs involved. The major brands are Märklin and Fleischman, which are largely distributed through specialist train and hobby shops. Key brands in modelling include Revell, Vitesse, Paul's Model Art and Corgi. The heavy concentration of the retail trade has contributed to the decline in interest, because the major stores are not investing in promoting model trains and more creative hobbies to the public (few specialist personnel and limited stock in shops). Many of the multiple shops and buying group members carry only starter train sets and have almost dropped the product category from their ranges. They often promote only well known hobbies and ones which are simply clearly illustrated and explained on the outer packaging of the products.

The Netherlands creative hobby market has one unusual segment which is not common in other European markets.

Selecta and other Netherlands factories produce a range of paper-based activities for small children, which are very popular. The possibilities include plaiting, cutting out, pricking holes and stitching. After a few years of growth, creative hobby articles now show a downward trend in The Netherlands.

Outdoor games

The importance of outdoor games was largely dictated by the climate: countries with a warm climate encouraged outdoor toys, taking their highest share in Spain and Italy. These products were relatively less important in the UK, The Netherlands and Germany, where the climate is more variable and, in case of the UK, gardens tend to be small. The outdoor games sub-sector showed a lack of real product innovation, with little development into interactive items to stimulate children's interest. Sales were also impacted by changing playing patterns.

Segmentation by buyers

Buyers' demography

Demographic factors also affect the sale figures.
The number of (first) children, the increasing number of households with two incomes and the growing group of relatively well-off and active parents stimulate sales.

The development in size of the age group 0-14 years is the key determinant of overall demand for toys and games. The number of 'first' children is especially important, as at least 60 per cent of all toys purchased are meant for them. The total number of children and of families with children is expected to continue growing slowly. As women are tending to put off motherhood until an older age and the number of single parents has risen, there are more smaller families and households with fewer children than in the past.

The composition of the group of children in the EU population is changing over time, because of immigrant nationalities. For example, in The Netherlands over 5.2 percent of children now have non-Netherlands nationalities and this percentage is expected to rise because of the tendency of these nationalities (primarily Turkish and Moroccan) to have more children per family. The big cities have the highest proportion of non-EU families. In Amsterdam, for example, 50 percent of all children are born to first or second generation immigrants.

Buyers' gender

Most of the toy purchases are made by women.
Men tend to buy more expensive articles than women do. Households with children are the biggest spenders on most categories of toys, except pre-school items, games for all ages and children's videos.

Table 3.6	Sales of outdoor games by selected EU countries, 1998-2000 US$ million/ € million						
	1998	1999	2000	1999	2000	change 98-00	% of total traditional toys and games
	US$ million			€ million			
France	211.9	213.4	198.8	201.3	216.1	- 6%	8.7
UK	209.8	131	112.8	123.6	122.6	- 46%	4.3
Germany	132.5	121.1	106.6	114.2	115.9	- 20%	4.6
Spain	73.7	77.8	76	73.4	82.6	3%	11.3

Source: Euromonitor (November 2001)

Note: Figures for The Netherlands are not available

Socio-economic factors

People are not generous or impulsive in their spending on toys, and their propensity to buy is not affected much by temporary changes in their personal or the general economic situation. Despite the improvement in consumer confidence since 1994, consumers have become increasingly critical about how they spend available disposable income. Items such as new savings and contributory pension schemes, holidays and other leisure activities have become relatively more important than expenditure on luxury goods, including toys and games.

At present there are socio-economic factors which influence toy purchasing both positively and negatively. Several positive factors are:

- Although spending per family is relatively low it is not affected greatly by temporary economic fluctuations, as parents are unwilling to ‘deprive’ their children of toys;
- The fact that women are postponing having children until an older age and are returning to work means that a larger budget is often available to spend on their children and those of friends and relatives;
- Double income households are much more typical than ten years ago;
- Older people have higher average incomes than in the past and therefore, money is available to spend on luxury items for themselves and their grandchildren.

Negative factors include:

- The increasing number of one-adult households, whose spending on toys, reflecting their generally lower incomes, is low;
- The overriding importance of price in purchasing decisions. The availability of a huge supply of competitively priced toys exercises a continuous downward pressure on the overall value of the market.
- Buyers’ knowledge o awareness of toy safety (toxic paint, small parts, function, noise etc.) are increased, which encouraged them more to buy other types of toys

Babies’ and toddlers’ toys are often bought by people without children as gifts for friends and relatives. Grandparents are important purchasers of videos.

Buyers’ age

The emphasis on different toy segments varies according to the age of the purchaser. 18-35 year olds are the most important purchasers of pre-school articles and videos. 35-60 year olds account for 60 percent of all purchases of computer games and are also important buyers of other games. People over 50, whilst they are the smallest buying group, tend to buy expensive items such as doll’s prams, tricycles, videos, and more traditional toys and games.

The proportion of older people in the population is rising. Typically, most men and women retire between the ages of 60 and 65, and have a longer healthier life expectancy and a higher income than the previous generations. They spend generously on toys for their grandchildren and great grandchildren.

Moreover, this active group of people with available spare time has been an important contributory factor to the surprising strength of the market for adults games, despite the strong competition from electronic alternatives.

3.3 Consumption patterns and trends

Products trends

Interactive toys, or smart toys, will continue to be the mainstay. The development and success of robotic pets well illustrate the adoption of advanced robotic technologies into toys. Sony’s Aibo, Silverlit-Tiger’s i-cybie and Manley’s Tekno have led robotic pets to hit store shelves. It is generally expected that the craze for robotic pets will extend into 2002, alongside an expansion in product varieties.
However, realism is increasingly important in developing smart toys, especially in categories such as dolls. Interestingly, it has been found that children prefer realistic-looking dolls to full-functioning robots.

Although video or electronic games have stormed the market in recent years, some parents are concerned about their possible negative impacts on children, such as a lack of social interaction and education value. Such concern may stimulate the demand for quality traditional toys. A case in point is the comeback of board games. Human interaction is the driving force behind the renewed interest in board games, such as a Monopoly tie-in with Pokemon, in contrast to many computer games which can be played alone.
This is particularly so after the terrorist attacks on the US, as consumers are becoming more family- and community-oriented. However, some board games are also being equipped with electronic components.
For example, a Harry Potter-related board game going to be released by Mattel will be equipped with casting stones in which computer chips are installed.
This should enable them to be used with other Potter products.

Educational toys are also emerging as a key category, whether electronic, non-electronic or a combination of the two. In particular, a wider adoption and more creative use of hi-tech technologies in such toys tends to stimulate demand. While older kids with computer skills have come to expect electronic interactivity, pre-school children may get their first introduction to information technology via a growing range of electronic educational toys.

With the rising popularity of the cyber world, linking toys with the Internet is another continuing trend.
The so called web-compatible toys enable players to interact with the designated websites.

For example, Lego has teamed up with Microsoft and Universal Music International for the launch of its latest product range of toys and CD-Roms, which are backed up by a website where children can learn about the universe and follow the story of a group of characters.
Another case in point is Eurpsville, a US based toys company, which produces story books and plush alphabets to stimulate the interest in reading.
Plans are in the pipeline to e-mail story lines to parents, so they can participate in the children’s learning cycle.

Although licensing based on movie characters has no warranty for success, licensed products are still a major factor for the toys industry. The year 2002 should continue to be a promising year for wizards, monsters and prehistoric action toys.
The Harry Potter figure is drawing much attention, particularly with the launch of the movie in late 2001 and the second movie premiere in November 2002.
Some other movie characters, say featured in The Monster, Inc. and the Lord of the Rings, are expected to hit the market and provide an extra impetus to the licensing business.

In another development, patriotic merchandise such as action figures of firemen and policemen have been selling well after the terrorist attacks. This revival is likely to go much beyond 2001.

Use of spare time
In the 1980s, demand for traditional toys by older children declined because of increasing competition from other articles and different demands on their leisure time. The term ‘KGOY’ (kids getting older younger) is used in the toy trade to describe the very adult behaviour of children at younger ages.
Sport clubs, music, television, clothing, cosmetics, tropical swimming pools, theme parks, street sports etc. have all been significant factors in turning attention away from traditional toys. In addition, children’s videos and computer games have caused major shifts both in the way time is spent playing at home and in the expenditure patterns of both adults and children on toys and games.

More recently, some social factors have been turning interest back to more traditional toys and games. Consumers are using their own free time more thoughtfully and are showing more interest in the function of toys as the source of a definite benefit, such as an aid to learning, the development of intelligence and general knowledge, relaxation/ entertainment and competitiveness.
These factors make a positive contribution to the reasonably healthy EU market for adult games and educational games.

Advertising
Television advertising has a very powerful influence on toy purchasing, as it enables the creation of a whole imaginary world and atmosphere around the character, toy or game which is being promoted.
For example, television accounts for over 80 percent of all toy advertising in The Netherlands, and a very high proportion of this occurs in the period from September to December. Television series (Sesame Street, and Telekids) also have a large influence on demand from children.

Toy folders distributed by the major retail groups, in which advertising space is purchased by the brand suppliers, are heavily influencing toy purchasing plans at the end of year, when many presents are bought.
The market for branded toys and media-stressed phenomenon like Pokémon is clearly growing.
These toy trends are mostly created by well-known multinational toy giants with immense market resources. Furthermore, toys and equipment bearing well-known brands such as Harley Davidson, Ferrari and Coca Cola is expanding strongly.

It should be noted that the toy industry in the European Union annually invests US$ 460 million (€ 500 million) in advertising. Most of this investment is made during the last three months of the year. The main media used are television, followed by the press, billboards and radio.

Seasonality

The major reason for EU people to buy toys and games is to give them as presents. The main annual occasion is Christmas. In The Netherlands, the eve of Saint Nicholas' birthday (5 December) is also a major occasion for giving presents.

About 40 percent of the retail toy trade's annual turnover in the Netherlands is generated in the November-December period, while in the UK, these two months account for more than 60 percent of annual toy sales.

Purchasing presents for birthdays accounts for approximately 35 percent of toy sales, and impulse purchases are considered to account for about 20 percent. Other occasions for giving children toys include sickness, school reports, diplomas, first communion and return from travel abroad.

> The prospects of growth for the EU in 2002 will remain relatively steady. While the pace of expansion will be hampered by a tight monetary environment, consumer confidence will likely gain from falling unemployment. As the growth and interest differentials between the USA and the EU are narrowing, the weakness of the euro is expected to alleviate overtime, giving support to more imports. Toys-wise, exports to the EU market are likely to be steady, and high-tech toys should do well, alongside the emphasis on traditional and educational toys. Meanwhile, prohibition on the use of phthalates in children's toys should not have significant effects on sales.

4 PRODUCTION

In 2000, total production of toys and games in the EU amounted to US$ 4,232 million (€ 4,600 million), indicating a small decrease of 4.5 percent compared to 1999.

The EU has 2,000 companies working in the toy and game sectors, 80 percent of which has less than 50 employees. The toy industry directly employs over 100,000 people in the EU; 53,500 of these work in production, and 45,000 in research and development, marketing, sales distribution, and many other services. About 5 percent of the companies has a turnover of more than US$ 44 million (€ 48 million).
Overall calculated production cost is distributed over one third labour cost, one third material, and one third overhead and profits.

Some of the European regions in which toy companies are concentrated have their factories in the Jura, in Northeast France near the border with Germany; the province of Alicante in Spain and the Bavarian Forest in Germany.

The toy industry in Europe is affiliated as the TIE association (Toy Industry Europe). Members of TIE are listed at www.tietoy.org/members.html The Toy Trader of Europe (TTE) is the only European Association representing the toy trade and exclusively deals with the interests and the needs of EU trade in regard to the harmonisation at European level of national requirements. The Internet site of the TTE www.toy-tte.org provides information on the market of toys in Europe and beyond, as well as links to other major toy Internet sites.

The toys and games market is characterised by the presence of a small number of major multinational players, complemented by a large raft of small companies focused either on a product area or a geographic area. The only manufacturers of traditional toys and games to have a significant international presence are Mattel, Hasbro and Lego. While some other manufacturers may have a broad international presence, none have as significant a share in most major markets as these three leading companies.

There are also large number of companies which are primarily focused on their domestic market, with little presence beyond this. These include leading Spanish manufacturer Famosa. There are also large numbers of local specialist companies such as Gemany's Habermaass Gruppe and Italy's Giochi Preziosi.

In the consoles and computer games sub-sector, there is less local variation because most manufacturers are present internationally. In consoles, the leading manufacturers are the same over the world. Japanese companies Sony, Nintendo and Sega are the leading console manufacturers in every major market.

One of the main problems manufacturers faced over the review period was the deterioration of natural demand for toys and games. In part, this was due to slowing birth rates in most industrialised countries, a phenomenon led by the increasing pace of life, the breakdown in traditional family structures and the entry of women into the workplace. Many women opted to delay starting a family, or chose to remain childless. This had a clear impact on the number of children within the 0-14 age group. Secondly, the cultural change led to children "getting older younger", meaning that the age bracket within which children wished to play with toys was narrowing.

Manufacturers also worked to offset decline in natural demand by three major methods:
- Extending the demographic coverage for toys to include twins, teenagers and adults;
- Generating increased demand by leveraging the alternative preoccupations of the media-literate child, such as films, TV and music;

Table 4.1 Leading manufacturer including their market segments

Manufacturer	**Market segments**
Lego	Intelligent toys
Berchet and Fauvre	dolls and pre-school toys
Ravensburger	games and puzzles featuring popular characters
Smoby and Chicco	pre-school toys
Zapf Creations	baby dolls

Source: Euromonitor (November 2001)

- Stimulating increased value sales by encouraging trading up to premium toys such as intelligent and interactive products.

United Kingdom

Although the United Kingdom used to have a major toy industry, production has fallen steadily in recent years in the face of increasing low cost competition from imports. In 2000, the UK's toys production showed a small recovery, amounting to US$ 743 million (€ 808 million).
The data in Table 4.1 have to be considered with care as data are not visible and, therefore, may not be comparable from period to period.

Table 4.2 UK manufacturing sales of toys and games, 1996-2000

Year	Manufacturing sales (US$million)	Manufacturing sales (€ million)
1996	938	-
1997	831	-
1998	771	-
1999	726	685
2000	743	808

Source: UK Office for National Statistics (2002)

Mattel and Hasbro, which together accounted for around 53% of all total dolls and figures' sales, dominated this subsector. Mattel with its best sellers Barbie and Ken, as well as Polly Pocket, managed to hold on to its lead. However, the company saw a slight reduction in its share due to the rise in popularity of Pokémon figures by its main rival Hasbro.

Table 4.3 Leading UK manufacturers including their market segments and shares, 2000

Market segments	Manufacturer
Dolls/figures	Mattel (28%), Hasbro (25%), Zapf Creations UK Ltd (16%), Dekker Toys Ltd (9%)
Activity/construction games	Lego (29%), K'Nex (19%), Meccano Toys Ltd (12%), Humbro/Airfix (11%), Binney & Smith/Revell (9%)
Indoor games	Ravensburger (21%), Upstarts (16%), Wizards of the Coast (17%), Waddingtons/Hasbro (9%)
Infant/pre-school	Hasbro (21%), Mattel (20%), Tomy Corp (15%), Playmobil UK Ltd (14%), Chicco (9%)
Model-wheeled vehicles	Mattel (25%), Hornby (17%), Simba (12%), Brio (8%), Nikko (6%)
Soft/Plush	Hasbro/Tiger (27%), Mattel (19%), Golden Bear (16%), Vivid Imagination (9%)
Consoles	Nintendo (47%), Sony (39%), Sega (13%)
Console games	Nintendo (25%), SCEE (20%), Eidos (8%), Electronic Arts (7%)
Computer games	Electronic Arts (24%), Havas Interactive Microsoft (20%), Hasbro Interactive (11%)

Source: Euromonitor (August 2001)

Germany

Increasing imports of cheap merchandise from South-East Asia have forced German manufacturers to concentrate mainly on upmarket products. Major manufacturers include Geobra Brandstätter (Playmobil), Märklin (the world's largest supplier of model railways), Ravensburger (board games and puzzles), Margarete Steiff (soft toys and dolls), Schmidt Spiel und Freizeit (board games and puzzles), Max Zapf / Europlay Toys (dolls), Big Spielwarenfabrik (riding toys) and Revell (models).

In the table below we specify some of the toys and games for which data are available.

Total toys and games production in Germany amounted to US$ 924 million (€1,004 million).

However, data are not available for all product groups. For puzzles, for example, only a volume figure for 1999 is available, showing that production amounted to almost 19 million (excluding wooden puzzles).

Please note that production in terms of local currency (DM) remained rather stable between 1999 and 2000, while in US$ it decreased.

The following table shows important German manufacturer including their market segments.

Table 4.4 Production of leading toys and games in Germany, 1998-2000 US$ million

Type	1998	1999 US$ million	2000	1999 € million	2000
Trains	309	311	259	293	282
animal toys	128	113	116	107	126
games operated by coins	95	94	87	89	95
wheeled toys	87	94	86	89	93
board games	55	36	32	34	35
Dolls	30	25	20	24	22
playing cards	22	16	15	15	16

Source: Statistische Bundesambt (2001)

Table 4.5 Leading German manufacturers including their market segments and shares, 2000

Market segment	Leading manufacturers
Dolls and figures	Zapf AG (29%), Mattel (22%), Hasbro (16%), Superjouet (6%)
Activity/construction games	Lego (31%), Habermaaß Gruppe (12%), Revell AG (10%), Siku-Wiking (7%)
Indoor games	Ravensburger AG (39%), Kosmos AG (12%), Amigo Spiel + Freizeit GmbH (8%), Jumbo Spiele GmbH (6%)
Infant/pre-school	Hasbro (20%), Mattel (19%), Geobra Brandstätter GmbH (15%), Tomy Corp (12%), Superjouet (9%)
Model-wheeled vehicles	Mattel (25%), Märklin (22%), Tronico-Europlay (14%), Dickie-Simba Gruppe (13%)
Soft/plush toys	Margarete Steiff GmbH (27%), Hasbro (25%), Schmidt Spiele GmbH/Blatz Gruppe (8%)
Consoles	Nintendo (50%), Sony (38%), Sega (10%)
Console games	Nintendo (16%), Activision (13%), Acclaim (11%), UBI Soft (11%), Electronic Arts (10%), Infogrames (9%), Konami (8%)
Computer games	Electronic Arts (34%), Microsoft (22%), EIDOS Interactive (14%), HAVAS Interactive (7%), Infogrames (10%)
Intelligent toys (*)	Hasbro/Tiger Electronics, Mattel, Lego, Zapf AG, V-Tech, Ravensburger AG

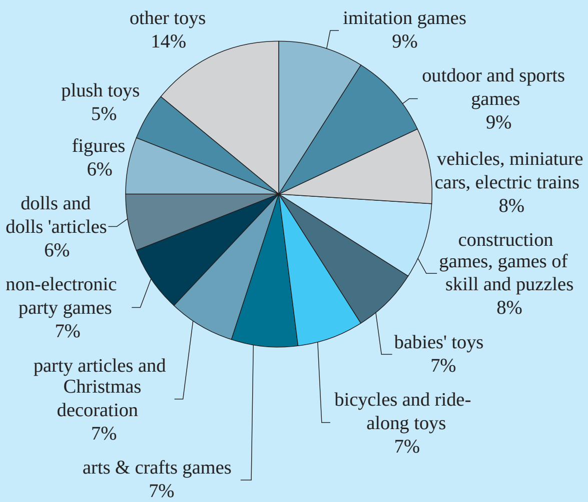
Source: Euromonitor (2001)

(*) Market shares of intelligent toys are not available.

France

The French sector association FJP estimates that toys and games production amounted to € 874.1 million (US$ 804.1 million) in 2000. Imitation games and outdoor & sports were the leading toys and games being produced in France.

Figure 4.1 French production of toys and games, 2000
% of total value



Source: FJP (2002)

Leading manufacturers including their market segments are shown below.

Spain

Spain is a major producer of traditional toys and games, with almost 27 percent of traditional sales sourced from domestic manufacturing. Nevertheless, imports are also high, and Spain imports more than its exports.
The primary source of imports is China, which in 2000 accounted for 42 percent of toys and games imports. Most toys and games imported from China are low priced basic products which are sold all year round. The soft/plush toys sub-sector in particular relies on imports.

Statistics on toys and games are displayed by AEFJ. National production of toys and games is estimated at about US$ 671 million (729 million) in 2000, indicating a slight increase compared to 1999.
There are 203 manufacturers of toys and games in Spain and the sector employs about 5,300 people, without taking into account the sustaining industry. Most of the enterprises are small to medium-sized, the medium-sized employing about 51 to 200 persons. Half of the country’s manufacturers are concentrated in the Comunidad de Valencia (especially the Valencia and Alicante Areas) where their sales account for 63 percent of the sector total. Catalan companies account for about 65 percent of the number of companies and 17 percent of sales.
There is a corresponding concentration of skill and expertise in the area.

Mattel Espana, Famosa (Fabricas Agrupadas de Munecas de Onil SA) and MB Espana (Hasbro) control more than 43 percent of Spanish production.

Table 4.6 Leading French manufacturers including their market segments and shares, 2000

Market segment	Leading manufacturers
Dolls and figures	Mattel (24%), Hasbro (29%), Berchet (6%), Smoby (4%), Tomy (1%)
Activity/construction games	Lego (20%), Ravensburger (12%), Meccano (7%), Playmobil (4%), K’Nex (4%)
Indoor games	Hasbro (47%), Ravenburger (12%), Mattel (7%), Goliath (5%)
Infant/pre-school	Mattel (14%), V-Tech (8%), Playmobil (8%), Hasbro (8%), Berchet (7%), Smoby (7%)
Model-wheeled vehicles	Mattel (26%), Majorette (4%), Tomy (1%)
Soft/plush toys	Hasbro (19%), Tomy (17%), Lansay (13%), Mattel (8%)
Consoles	Sony (52%), Nintendo (36%), Sega (12%)
Console games	Sony Entertainment (24%), Nintendo (15%), Infogrames (15%), Ubisoft (14%)
Computer games	Microsoft (25%), Infogrames (16%), Havas Interactive (19%), Electronic Art (9%)
Intelligent toys (*)	Tomy, V-Tech, Hasbro, Lego, Mattel,

Source: Euromonitor (2001) *(*) markets shares are not available.*

Table 4.7 Major Spanish manufacturers including their market segments and shares, 2000

Market segment	Leading manufacturers
Dolls and figures	Famosa (45%), Hasbro Iberia SL (20%), Mattel Espana SA (16%)
Activity/construction games	Popular de Juguetes SL (18%), Famosa (17%), Lego SA (15%), Hasbro (9%)
Indoor games	Hasbro Iberia SL (65%), Diset SA (8%), Mattel Espana SA (7%), Famosa (5%)
Infant/pre-school	Hasbro Iberia SL (52%), Mattel Espana SA (28%), Smoby Espana (5%)
Model-wheeled vehicles	Famosa (19%), Tecnitoys Juguetes SA (17%), Hasbro Iberia (8%)
Soft/plush toys	Hasbro Iberia SL (55%), Mattel Espana SA (21%)
Consoles	Sony (60%), Nintendo Espana (37%), Sega (3%)
Console games	Sony (22%), Nintendo (20%)
Computer games	Electronic Arts Software SL (22%), Proein SA (15%), Dinamic Multimedia SA (11%)
Intelligent toys (*)	Hasbro Iberia SL, Mattel Espana SA, Lego SA, V-Tech Electronics

Source: Euromonitor (January 2002) *(*) markets shares are not available.*

These companies clearly dominated the mass market, with large number of small-medium-sized companies focused on specific product niches.

The computer and console games sector is almost entirely controlled by Japanese companies.
In fact, the Sony Computer Entertainment Espana SA became the leading player in the overall toys and games market, surpassing Famosa.

The incorporation of new technology into the toys and games market is stimulating sales within traditional sub-sectors, with products ranging from talking dolls or walkie-talkies to digital cameras or even mobile phones. However, it was the Furby craze which kick-started consumer interest in intelligent toys.

Many manufacturers have introduced new technology within their products, especially following the fall in the cost of micro chip prices. However, Hasbro's Furby still remains the leading brand of intelligent toy.

The Netherlands

The Dutch Central Statistics Office (CBS) does not publish data on the toys and games industry. However, it could be stated that The Netherlands hardly has a toy industry of much importance. The largest Netherlands manufacture is Koninklijke Hausemann en Hotte NV, which produces the Jumbo brand of board games and puzzles. It has about 200 employees and a registered turnover of about NLG 96 million (US$ 40 million, € 44 million) in 2000, an increase of 25 percent compared to 1999. Some 15 percent of the turnover is realised by Jumbo Netherlands, while 39 percent is generated by Jumbo Spiele in Germany.

Other companies include SES Nederland BV, producer of hobby materials (paint, crayons, chalk, glues, stationery etc.), van Ee (Mammoet), Jegro, Buma and Daigt, manufacturers of high quality wooden toys. About three quarters of production is exported.
It should be noted that most of the products from Koninklijke Hausemann en Hotte NV made in Asia.

5 IMPORTS

5.1 Total imports

As mentioned earlier, the toys discussed in this chapter and in chapter 6 will follow the HS categories. These trade statistics make finer distinctions, differentiating not only by product but also by raw material content. Plastic, wood, metal, textile and rubber items are identified separately.

Between 1998 and 2000, imports of toys and games by EU member countries increased by a small 3 percent in terms of US$, amounting to over US$ 10.7 billion in 2000. In terms of volume, however, the picture looks somewhat different, with imports decreasing by 42 percent over the same period, amounting to less than 1.2 million tonnes in 2000. It should be noted that, although the US$ is the basic currency unit used to indicate the imported values, Eurostat trade statistics are expressed in € and transferred into US$.

Hence the developments in the imported values are also influenced by the € / US$ exchange rate. The increase of the imported value in € is more pronounced than in US$.

For more information about the exchange rate, please refer to Chapter 2 of this survey. Please also refer to Appendix 2 for detailed trade statistics (including the € values) of the EU and of the major national trade markets within the EU.

In 2000, the United Kingdom was the leading importer, accounting for 21 percent of the total imported value by EU member countries, followed by Germany (18%), France (15%), The Netherlands (12%), Belgium (8%) and Spain (8%).

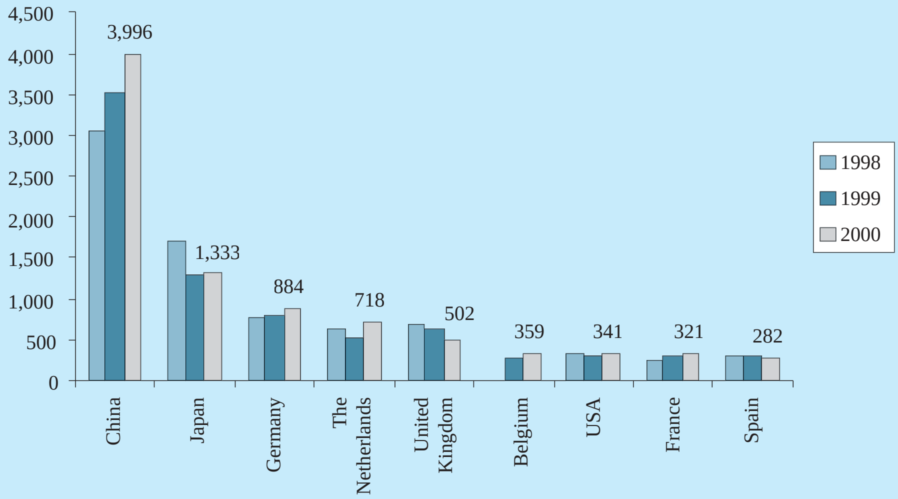
Toys and games were mainly supplied by non-EU countries. In 2000, 64 percent of imports by EU member states was supplied by non-EU countries, of which almost two thirds originated in developing countries. China and Japan were the leading supplying countries, together accounting for half of the total imported value in 2000. Other suppliers were the United States and some other European countries. The actual market share of U.S. brand toys, whether they originate directly in the United States or were manufactured elsewhere, is around 10 to 13 percent.

Table 5.1 Imports of toys and games by EU member countries, 1998-2000
US$ million / € million / thousand tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	10,384	1,996	10,311	9,728	1,197	10,722	11,655	1,162
United Kingdom	2,080	1,239	2,021	1,906	381	2,291	2,490	242
Germany	2,123	186	1,979	1,867	189	1,919	2,086	193
France	1,364	130	1,393	1,314	145	1,601	1,741	188
The Netherlands	1,257	93	1,308	1,234	90	1,258	1,367	100
Belgium	n.a.	n.a.	780	736	85	831	903	89
Spain	709	67	784	740	83	824	896	101
Italy	827	93	753	711	94	754	820	104
Austria	293	21	293	277	22	276	300	22
Sweden	270	19	237	223	21	230	250	23
Denmark	198	20	195	184	21	179	195	22
Ireland	147	13	139	131	16	156	170	18
Portugal	150	15	182	172	19	153	166	17
Greece	151	16	145	137	21	140	152	31
Finland	74	6	69	65	7	76	83	7
Luxembourg	n.a.	n.a.	33	31	3	35	38	3
Belgium & Luxembourg	744	77	-	-	-	-	-	-

n.a. not available *For the year 1998, figures for Belgium and Luxembourg are not separately available.*
Source: Eurostat (2001)

Figure 5.1 **The leading suppliers of toys and games to the EU, 1998-2000**
US$ thousand



Source: Eurostat (2001)

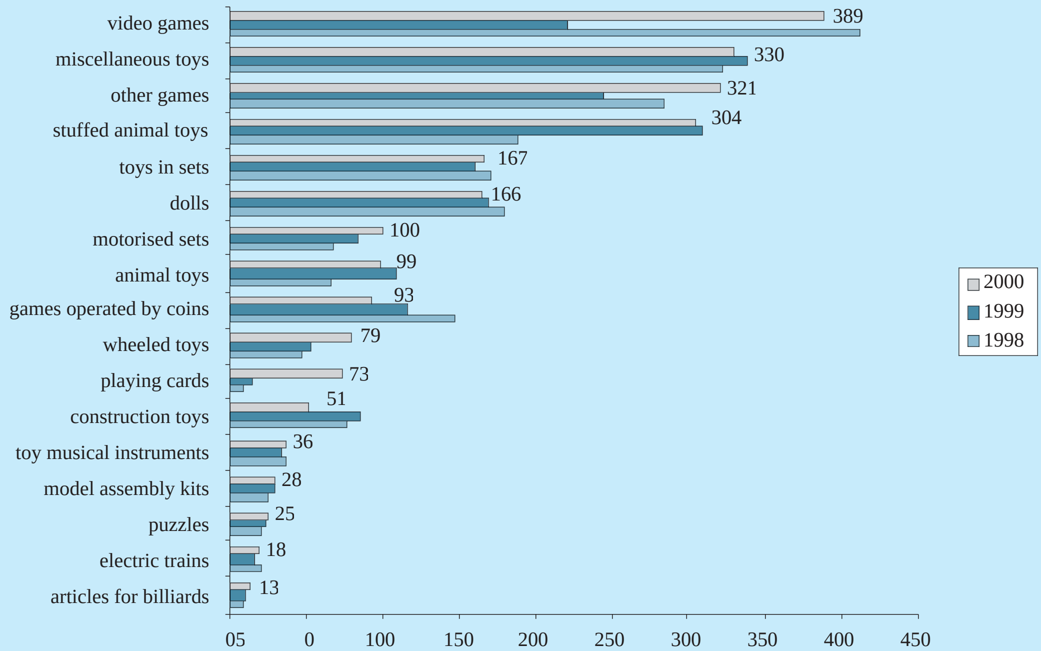
United Kingdom

In 2000, the United Kingdom was the leading EU importer of toys and games, with imports amounting to US$ 2.3 billion (242 thousand tonnes) in 2000.

Compared to 1998, this represented an increase by 10 percent in value, but a decrease in volume by as much as 80 percent. Between 1998 and 2000, the imports of wheeled toys, stuffed animal toys, animal toys and playing cards all increased by 50 percent or more in terms of value. Please also note that the imported value of video games was almost cut by half in 1999, but had recovered by 2000.

In 2000, 73 percent of the imported products was supplied by non-EU countries, of which 68 percent originated in developing countries.

Figure 5.2 **Imports of toys and games into the United Kingdom, 1998-2000**
in US$ thousand



Source: Eurostat (2001)

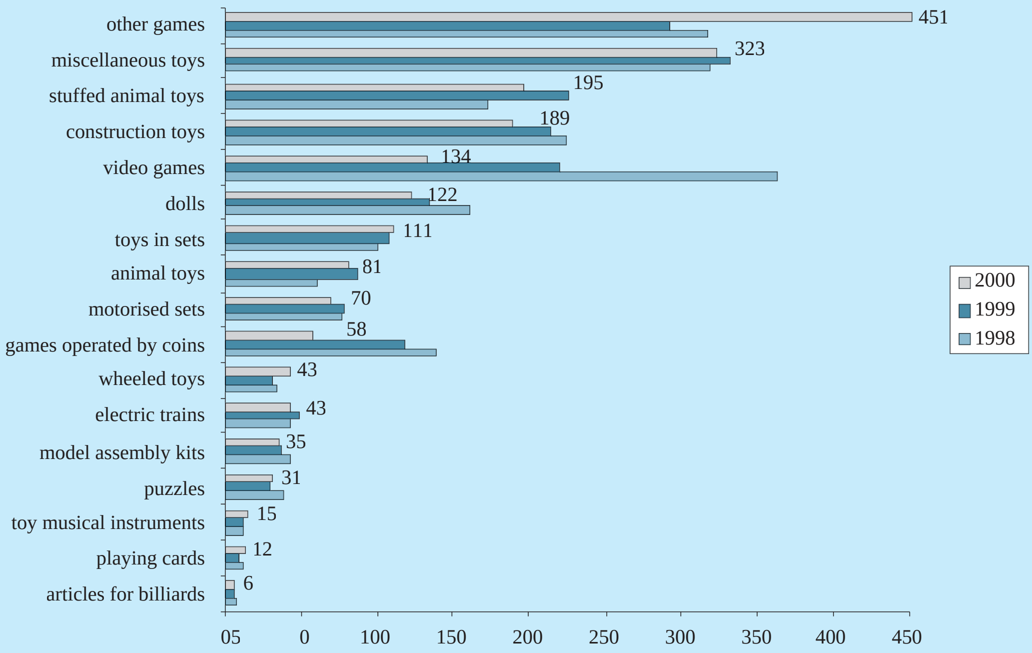
The leading suppliers of toys and games to the United Kingdom (share of the total imported value in 2000)		Total share DC
wheeled toys	China (41%), Taiwan (18%), Spain (14%), Germany (6%), France (6%)	42%
dolls	China (77%), The Netherlands (3%), Hong Kong (3%), France (3%)	81%
electric trains	China (57%), USA (10%), Germany (9%), Denmark (5%), Italy (4%)	58%
model assembly kits	Japan (28%), China (16%), USA (14%), Taiwan (11%), Germany (6%)	18%
construction toys	Denmark (29%), Switzerland (26%), Canada (11%), China (10%)	11%
stuffed animal toys	China (83%), Indonesia (5%), Vietnam (3%), Sri Lanka (2%)	94%
animal toys	China (84%), Germany (4%), Italy (2%), USA (2%)	86%
toy musical instruments	China (84%), Belgium (5%), Thailand (3%), Italy (2%), Israel (2%)	87%
puzzles	China (37%), The Netherlands (18%), Germany (11%), Thailand (5%)	45%
toys in sets	China (75%), USA (3%), Spain (3%), France (3%), Hong Kong (2%)	80%
motorised sets	China (74%), Spain (10%), Malaysia (4%), USA (3%), Thailand (3%)	80%
miscellaneous toys	China (64%), USA (6%), Italy (5%), Germany (4%), France (3%)	69%
video games	The Netherlands (50%), Japan (26%), Germany (9%), Austria (4%)	3%
articles for billiards	China (52%), Taiwan (22%), France (6%), USA (4%), Indonesia (4%)	56%
games operated by coins	Japan (35%), China (21%), USA (11%), Spain (6%), Germany (6%)	22%
playing cards	USA (45%), The Netherlands (44%), Belgium (3%), Australia (2%)	2%
toys and games	**China (47%), Japan (13%), The Netherlands (12%), Germany (5%)**	**50%**

DC: Developing Countries

Germany

In 2000, Germany was the second leading EU importer of toys and games, with imports amounting to US$ 1.9 billion (193 thousand tonnes). Between 1998 and 2000, German imports of toys and games decreased by 10 percent in value, but increased by 4 percent in volume. During this period of time, the imported value of other games increased explosively, while the imported value of video games decreased even harder. Other remarkable fluctuations were the decreases in imports of dolls and games operated by coins. In 2000, almost 80 percent of the imported products (in terms of value) were supplied by non-EU countries, of which 59 percent originated in developing countries.

Figure 5.3 Imports of toys and games into Germany, 1998-2000 in US$ thousand



Source: Eurostat (2001)

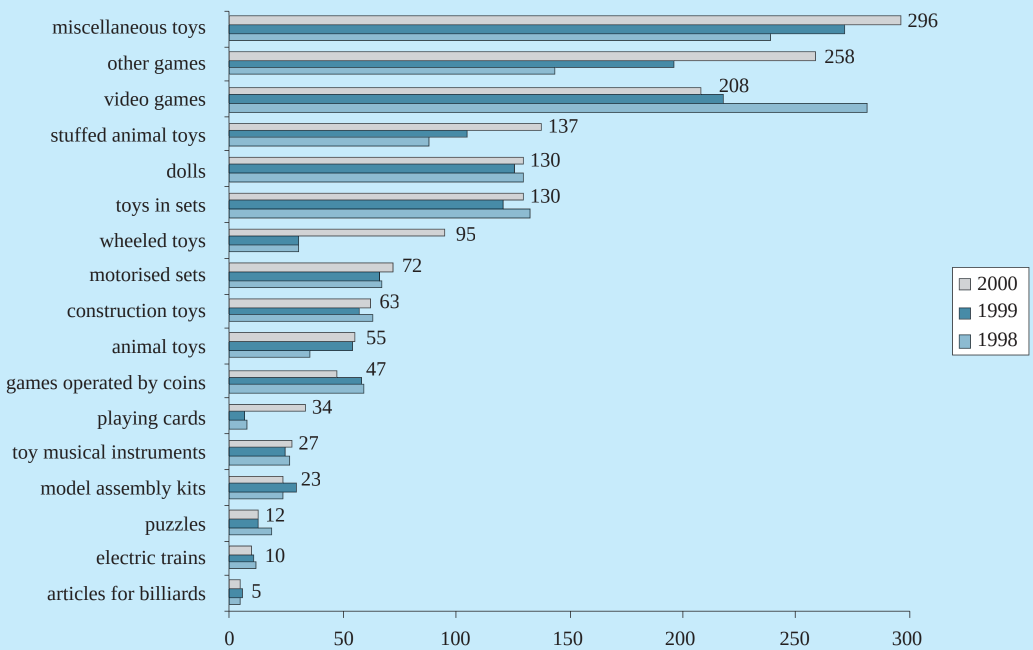
The leading suppliers of toys and games to Germany (share of the total imported value in 2000)		Total share DC
wheeled toys	China (47%), Italy (14%), Taiwan (9%), France (7%)	49%
dolls	China (67%), Malta (8%), The Netherlands (4%), Spain (4%)	80%
electric trains	Austria (39%), Hungary (17%), China (12%), South Korea (7%)	12%
model assembly kits	Japan (26%), Czech Republic (16%), China (9%), Taiwan (9%)	11%
construction toys	Switzerland (39%), China (13%), Italy (2%), Czech Republic (2%)	14%
stuffed animal toys	China (72%), Indonesia (7%), Austria (3%), The Netherlands (3%)	85%
animal toys	China (65%), Italy (5%), France (3%), Vietnam (3%)	73%
toy musical instruments	China (35%), Czech Republic (18%), Romania (15%), Italy (9%)	38%
puzzles	France (45%), Portugal (11%), China (11%), The Netherlands (6%)	15%
toys in sets	China (60%), France (5%), Czech Republic (5%), Portugal (5%)	64%
motorised sets	China (75%), The Netherlands (8%), Japan (5%), Malaysia (4%)	80%
miscellaneous toys	China (44%), Malta (11%), Czech Republic (7%), The Netherlands (5%)	61%
video games	Japan (89%), China (5%), Austria (2%)	5%
articles for billiards	China (42%), Taiwan (13%), USA (13%), Belgium (9%)	43%
games operated by coins	USA (33%), UK (28%), Austria (19%), Poland (4%)	3%
playing cards	The Netherlands (54%), USA (21%), Belgium (11%), France (3%)	3%
toys and games	**China (41%), Japan (18%), Switzerland (4%), The Netherlands (3%)**	**47%**

DC: Developing Countries

France

In 2000, France was the third leading EU importer of toys and games, with imports amounting to US$ 1.6 billion (188 thousand tonnes).
This represented an increase by 17 percent in value and by 45 percent in volume since 1998, which was mainly caused by considerable increases in imports of miscellaneous toys, other games, stuffed animal toys, wheeled toys and playing cards. Between 1998 and 2000, the imports of video games decreased by more than 25 percent in value.
About 43 percent of the imported value of toys and games in 2000 originated in non-EU countries, of which 84 percent in developing countries.

Figure 5.4 Imports of toys and games into France, 1998-2000 in US$ thousand



Source: Eurostat (2001)

The leading suppliers of toys and games to France (share of the total imported value in 2000)		Total share DC
wheeled toys	China (50%), Belgium (19%), Spain (11%), Italy (8%), Taiwan (5%)	51%
dolls	China (64%), Belgium (12%), Spain (11%), Indonesia (6%)	71%
electric trains	China (20%), Germany (20%), Italy (14%), Austria (12%)	27%
model assembly kits	Germany (34%), Taiwan (13%), Italy (9%), Japan (9%), China (7%)	10%
construction toys	Denmark (45%), Switzerland (27%), Belgium (7%), China (6%)	8%
stuffed animal toys	China (40%), Belgium (33%), UK (11%), Indonesia (3%)	49%
animal toys	China (58%), Belgium (17%), UK (9%), Germany (4%)	61%
toy musical instruments	China (53%), The Netherlands (29%), Belgium (8%), Italy (4%)	53%
puzzles	Germany (22%), The Netherlands (16%), Spain (10%), China (10%)	14%
toys in sets	China (51%), Germany (21%), Belgium (10%), UK (6%), Spain (2%)	54%
motorised sets	China (55%), Malaysia (21%), Belgium (10%), Spain (6%)	76%
miscellaneous toys	China (41%), Belgium (17%), Italy (10%), UK (7%), Germany (7%)	46%
video games	The Netherlands (42%), Germany (14%), UK (14%), Belgium (14%)	5%
articles for billiards	UK (41%), The Netherlands (12%), Belgium (11%), China (10%)	10%
games operated by coins	USA (33%), UK (15%), Spain (13%), Austria (10%), Japan (6%)	6%
playing cards	The Netherlands (64%), USA (16%), Italy (7%), Belgium (6%)	2%
toys and games	**China (32%), Germany (14%), Belgium (14%), The Netherlands (10%)**	**36%**

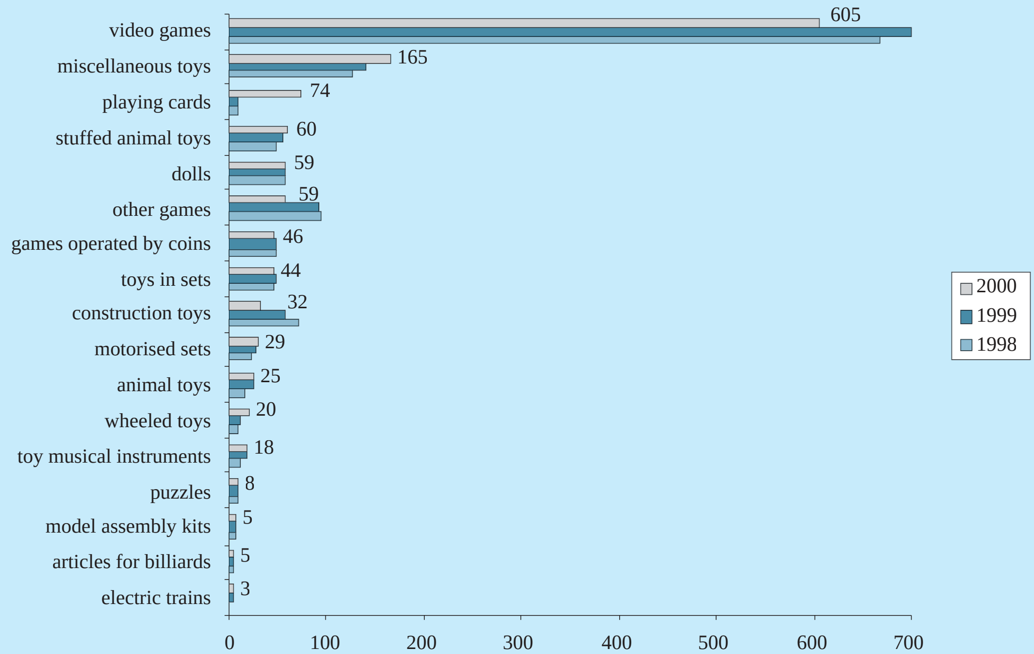
DC: Developing Countries

The Netherlands

The Netherlands ranks among the leading EU importers of toys and games. In 2000, imports into The Netherlands amounted to almost US$ 1.3 billion or 100 thousand tonnes, representing a decrease by 4 percent in value but an increase by 10 percent in volume compared to the preceding year.

Between 1998 and 2000, imports of miscellaneous toys and playing cards showed the largest increases in terms of value, while the imports of video games and other games showed the largest decreases in terms of value. In 2000, 84 percent of the imported value of toys and games originated in non-EU countries, of which 31 percent in developing countries.

Figure 5.5 Imports of toys and games into The Netherlands, 1998-2000 in US$ thousand



Source: Eurostat (2001)

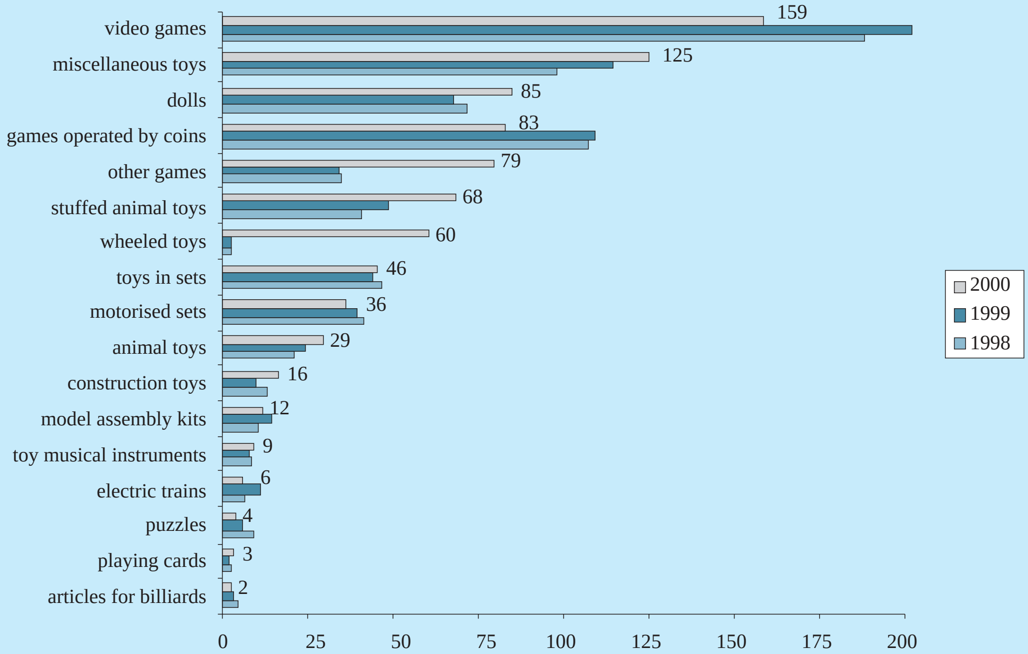
The leading suppliers of toys and games to The Netherlands (share of the total imported value in 2000)		Total share DC
wheeled toys	China (46%), Germany (15%), Taiwan (11%), Hong Kong (6%)	50%
dolls	China (61%), Indonesia (9%), Germany (9%), Hong Kong (7%)	72%
electric trains	Germany (51%), Italy (12%), China (12%), USA (6%), Belgium (3%)	14%
model assembly kits	China (22%), Japan (15%) Germany (13%), Hong Kong (12%)	24%
construction toys	Belgium (62%), Denmark (15%), Switzerland (14%), China (4%)	4%
stuffed animal toys	China (72%), Hong Kong (7%), Indonesia (5%), Germany (5%)	78%
animal toys	China (59%), Germany (12%), Japan (6%), Hong Kong (5%)	62%
toy musical instruments	China (90%), Hong Kong (2%), Italy (2%), Poland (2%)	90%
puzzles	China (58%), Germany (14%), Taiwan (6%), Canada (6%)	60%
toys in sets	China (52%), Germany (24%), Italy (8%), Hong Kong (6%)	53%
motorised sets	China (68%), Malaysia (13%), Hong Kong (10%), Germany (1%)	82%
miscellaneous toys	China (57%), Hong Kong (9%), Germany (6%), Italy (5%)	64%
video games	Japan (95%), UK (1%), Austria (1%)	1%
articles for billiards	China (37%), Hong Kong (17%), Taiwan (12%), USA (8%), Japan (7%)	39%
games operated by coins	UK (45%), USA (19%), Japan (13%), Slovenia (5%), Austria (3%)	8%
playing cards	USA (73%), Belgium (20%), UK (2%)	1%
toys and games	**Japan (46%), China (24%), USA (6%), Germany (4%), Belgium (4%)**	**26%**

DC: Developing Countries

Spain

Spain ranks among the leading EU importers of toys and games, with imports amounting to US$ 824 million (101 thousand tonnes) in 2000. This represented an increase by 16 percent in value and by 52 percent in volume since 1998. Between 1998 and 2000, the largest increases occurred in the imported values of miscellaneous toys, other games, stuffed animal toys and wheeled toys. The imports of video games and games operated by coins showed the largest decreases in terms of value since 1998.
Half of the imported value in 2000 originated in non-EU countries, of which 87 percent in developing countries.

Figure 5.6 Imports of toys and games into Spain, 1998-2000 in US$ thousand



Source: Eurostat (2001)

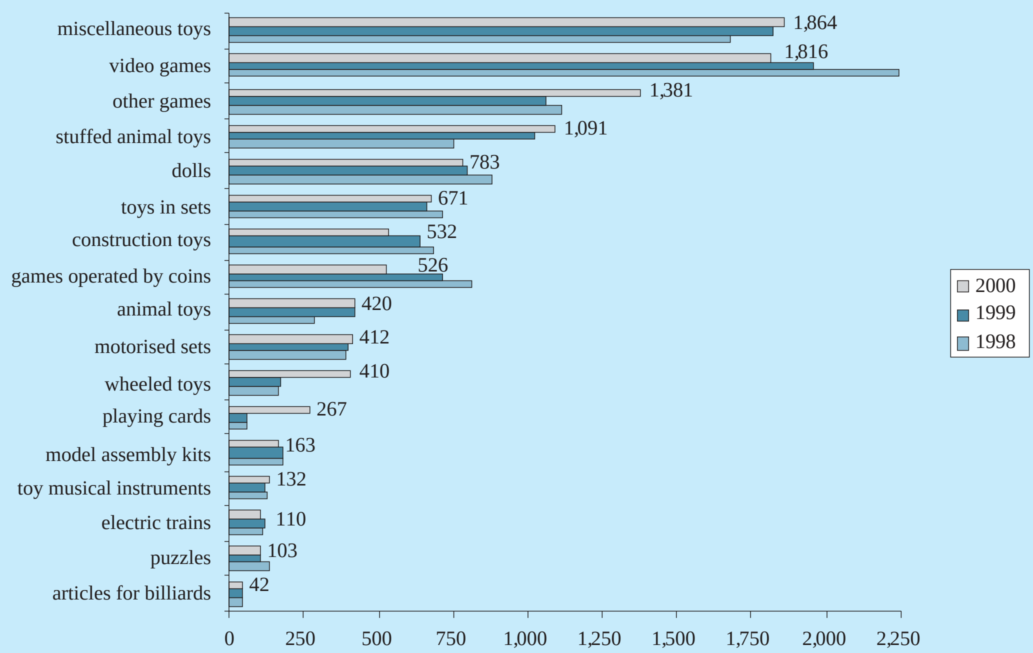
The leading suppliers of toys and games to Spain (share of the total imported value in 2000)		Total share DC
wheeled toys	China (75%), Taiwan (14%), France (2%), Italy (2%),Belgium (2%)	76%
dolls	China (74%), France (15%), Germany (6%), United Kingdom (1%)	75%
electric trains	Germany (28%), UK (26%), China (22%), Austria (9%), Italy (6%)	23%
model assembly kits	Hong Kong (37%), China (16%), Germany (10%), Italy (8%)	18%
construction toys	Germany (39%), Switzerland (19%), China (14%), Denmark (13%)	14%
stuffed animal toys	China (74%), UK (8%), France (5%), Italy (5%), Germany (1%)	77%
animal toys	China (53%), Germany (11%), France (8%), UK (7%), Malta (5%)	59%
toy musical instruments	China (75%), France (7%), Italy (5%), The Netherlands (5%)	78%
puzzles	China (42%), Italy (15%), Taiwan (10%), Germany (10%), France (7%)	44%
toys in sets	China (56%), The Netherlands (18%), France (13%), UK (3%)	57%
motorised sets	China (75%), Malaysia (10%), France (8%), Belgium (2%)	87%
miscellaneous toys	China (60%), France (14%), Italy (6%), UK (4%), Germany (3%)	64%
video games	UK (36%), Germany (30%), Belgium (13%), Austria (9%), China (4%)	4%
articles for billiards	China (17%), Taiwan (17%), Italy (16%), The Netherlands (12%)	17%
games operated by coins	UK (47%), Germany (13%), Austria (9%), Italy (6%), UK (6%)	5%
playing cards	The Netherlands (25%), France (22%), Belgium (17%), China (17%)	17%
toys and games	**China (42%), Germany (16%), UK (14%), France (7%), Belgium (3%)**	**44%**

DC: Developing Countries

5.2 Imports by product group

Figure 5.7 shows an overview of EU imports and developments, over the last three years, of toys and games, falling under the broad-based product groups indicated in Section 1.1. Please refer to Appendix 1 for detailed trade data for these product groups.
As already mentioned, total imports of toys and games by EU member counties amounted to almost US$ 11 billion or 1.2 million tonnes in 2000. Miscellaneous toys pushed video games from the first place and became the leading imported product group, accounting for more than 17 percent of the total imported value by EU member countries in 2000, followed by video games (17%), other games (13%), stuffed animal toys (10%) and dolls (7%) .

Figure 5.7 Imports of toys and games by EU member countries, 1998-2000 US$ million



Source: Eurostat (2001)

MISCELLANEOUS TOYS

Between 1998 and 2000, imports of miscellaneous toys by EU member states increased by 11 percent in value but decreased by 12 percent in volume, amounting to nearly US$ 1.9 billion or 308 thousand tonnes in 2000. In the same year, the United Kingdom was the leading importer, accounting for 18 percent of the total imports (in value) by EU member countries, followed by Germany (17%), France (16%), Belgium (11%) and Italy (10%). In 2000, 55 of the imported value of miscellaneous toys by EU member countries was supplied by developing countries.

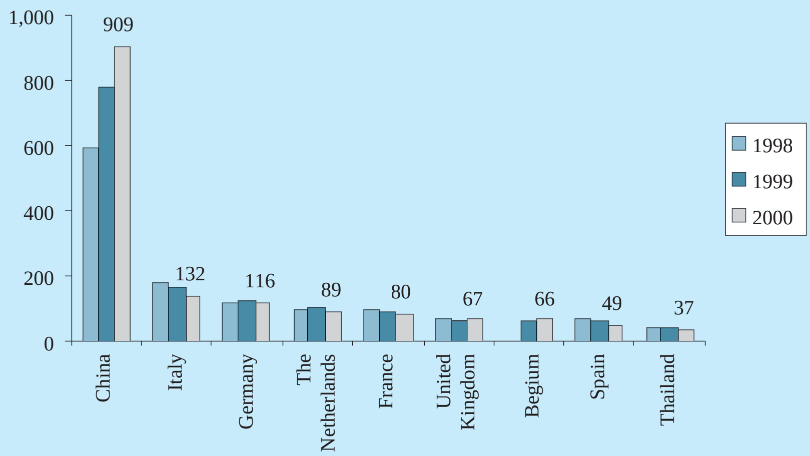
The leading supplier was, by far, China, supplying around half of the imports by EU member countries.

Table 5.2 Imports of miscellaneous toys by EU member countries, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	1,679,688	351,959	1,824,129	1,720,876	296,978	1,863,527	2,025,573	308,319
United Kingdom	321,786	151,582	339,726	320,496	64,036	329,659	358,325	52,713
Germany	319,388	41,698	333,030	314,179	47,592	322,961	351,045	48,372
France	239,138	34,770	270,796	255,468	41,469	295,617	321,323	50,059
Belgium	n.a.	n.a.	203,689	192,159	30,289	195,861	212,892	30,157
Italy	161,334	29,517	172,395	162,637	31,383	186,437	202,649	36,101
The Netherlands	126,941	22,939	140,602	132,643	23,640	164,671	178,990	27,827
Spain	97,914	15,353	114,575	108,090	21,971	125,101	135,979	22,971
Denmark	42,740	5,833	46,074	43,466	6,265	42,589	46,292	6,962
Austria	37,491	4,048	46,061	43,454	5,369	39,901	43,371	4,807
Ireland	23,221	2,838	27,655	26,090	3,162	38,274	41,602	4,032
Sweden	40,962	4,771	37,556	35,430	5,165	34,973	38,014	5,140
Portugal	30,391	4,249	38,003	35,852	6,148	34,175	37,147	5,404
Greece	24,110	3,734	30,075	28,373	7,053	29,540	32,109	10,343
Finland	14,844	1,837	15,017	14,167	1,965	15,306	16,637	2,180
Luxembourg	n.a.	n.a.	8,878	8,375	1,471	8,461	9,197	1,251
Belgium & Luxembourg	199,424	28,790	-	-	-	-	-	-

Source: Eurostat (2001)

Figure 5.8 The leading suppliers of miscellaneous toys to the EU, 1998-2000
US$ thousand



Source: Eurostat (2001)

VIDEO GAMES

Although video games were the second leading imported products in 2000, this product group was not very interesting for developing country exporters, since only 6 percent of the imported value of video games by EU member countries originated in developing countries. In 2000, total imports by EU member countries amounted to US$ 1.8 billion (33 thousand tonnes), of which one third was imported into The Netherlands. Another leading EU importer of video games was the United Kingdom, accounting for 21 percent of the total imported value, followed by France (11%), Spain (9%) and Belgium (9%).

The leading supplier of video games was, by far, Japan, supplying almost half of the imported value by EU member countries in 2000, followed by The Netherlands (17%), Germany (9%), United Kingdom (8%) and Indonesia (3%).

OTHER GAMES

Although imports of other games by EU member countries increased by 30 percent in terms of value, imports in terms of volume decreased by 56 percent (mainly caused by UK imports) between 1998 and 2000. In 2000, imports amounted to US$ 1.4 billion (106 thousand tonnes), of which one third was imported into Germany. Another leading EU importer was the United Kingdom, accounting for 23 percent of the imported value in 2000, followed by France (19%), Spain (6%) and The Netherlands (4%).

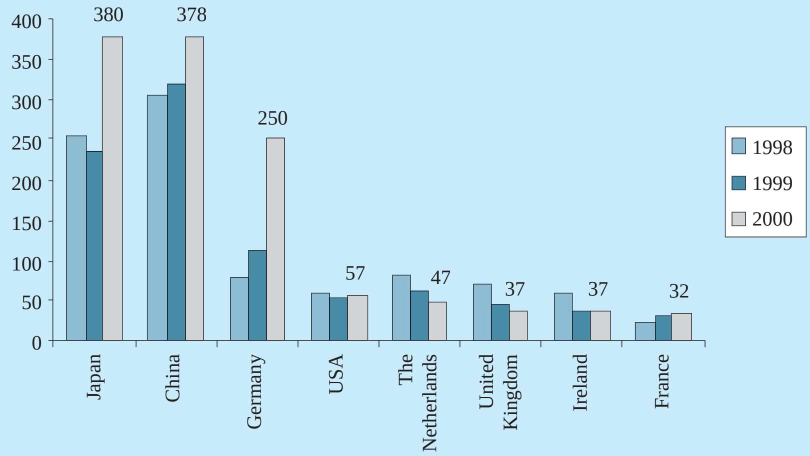
In 2000, 29 percent of the imported value of other games by EU member countries was supplied by developing countries. The leading suppliers were China and Japan, together supplying more than half of the imports by EU member countries.

Table 5.3 Imports of other games by EU member countries, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	1,111,746	1,020,853	1,062,997	1,002,827	240,030	1,380,569	1,500,618	106,058
Germany	317,521	21,913	291,840	275,321	19,196	451,262	490,502	19,509
United Kingdom	283,080	948,009	243,132	229,370	164,748	320,637	348,519	28,294
France	144,051	13,923	196,697	185,563	16,254	257,897	280,323	19,426
Spain	35,237	4,840	34,605	32,646	5,351	79,432	86,339	6,437
The Netherlands	94,666	12,132	90,485	85,363	12,743	58,790	63,902	10,580
Belgium	n.a.	n.a.	62,062	58,549	7,314	54,883	59,655	6,204
Austria	31,320	1,897	29,210	27,557	2,279	34,681	37,697	2,239
Italy	40,639	4,530	30,595	28,863	3,861	33,587	36,508	3,689
Sweden	41,181	2,199	19,626	18,515	1,979	26,519	28,825	2,811
Ireland	13,658	789	13,513	12,748	595	18,449	20,053	913
Denmark	22,413	1,835	22,196	20,940	2,203	16,307	17,725	1,838
Finland	7,634	862	6,997	6,601	942	10,743	11,677	881
Greece	14,935	1,642	12,020	11,340	1,484	9,469	10,292	2,469
Portugal	9,636	733	8,512	8,030	965	6,561	7,132	652
Luxembourg	n.a.	n.a.	1,508	1,423	116	1,351	1,468	116
Belgium & Luxembourg	55,774	5,549	-	-	-	-	-	-

Source: Eurostat (2001)

Figure 5.9 The leading suppliers of other games to the EU, 1998-2000
US$ thousand



Source: Eurostat (2001)

STUFFED ANIMAL TOYS

Between 1998 and 2000, imports of stuffed animal toys increased by 45 percent in value and by 56 percent in volume, amounting to US$ 1.1 billion or 114 thousand tonnes. The United Kingdom was the leading importer, accounting for 28 percent of imports (in value) by EU member countries, followed by Germany (18%), France (13%) and Belgium (10%). Around 80 percent of the imports of stuffed animal toys was supplied by developing countries.

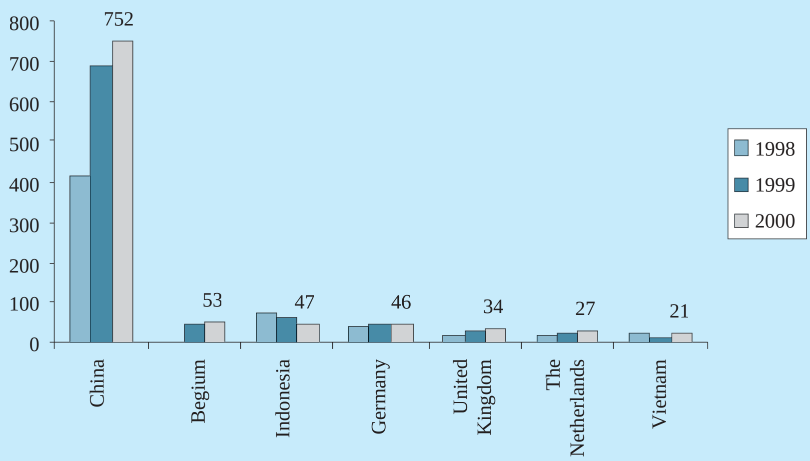
In 2000, China was the leading supplier, accounting for 69 percent of the imports (in value) by EU member countries.

Table 5.4 Imports of stuffed animal toys by EU member countries, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	750,121	72,655	1,024,203	966,229	95,824	1,090,838	1,185,694	113,528
United Kingdom	187,901	19,582	309,322	291,813	27,230	304,398	330,867	28,296
Germany	173,793	15,903	225,299	212,546	20,237	195,279	212,260	19,862
France	87,336	7,435	104,628	98,706	9,659	137,249	149,184	13,494
Belgium	n.a.	n.a.	70,332	66,351	7,283	110,239	119,825	11,441
Italy	71,099	6,783	95,870	90,443	9,075	99,354	107,994	11,045
Spain	40,766	4,625	48,245	45,514	5,965	68,395	74,342	9,130
The Netherlands	48,122	5,752	55,100	51,981	6,214	60,297	65,540	7,553
Austria	21,843	1,359	31,546	29,760	2,021	29,301	31,849	2,366
Sweden	17,368	1,546	21,722	20,492	1,979	27,010	29,359	2,797
Denmark	15,016	1,355	18,586	17,534	1,773	17,887	19,442	2,065
Greece	11,070	1,410	12,448	11,743	1,615	13,223	14,373	2,893
Portugal	8,999	774	10,935	10,316	1,155	10,149	11,032	1,119
Ireland	7,143	601	9,752	9,200	826	8,642	9,393	664
Finland	7,142	536	8,015	7,561	630	7,871	8,555	725
Luxembourg	n.a.	n.a.	2,404	2,268	162	1,544	1,678	78
Belgium & Luxembourg	52,526	4,994	-	-	-	-	-	-

Source: Eurostat (2001)

Figure 5.10 The leading suppliers of stuffed animal toys to the EU, 1998-2000
US$ thousand



Source: Eurostat (2001)

DOLLS

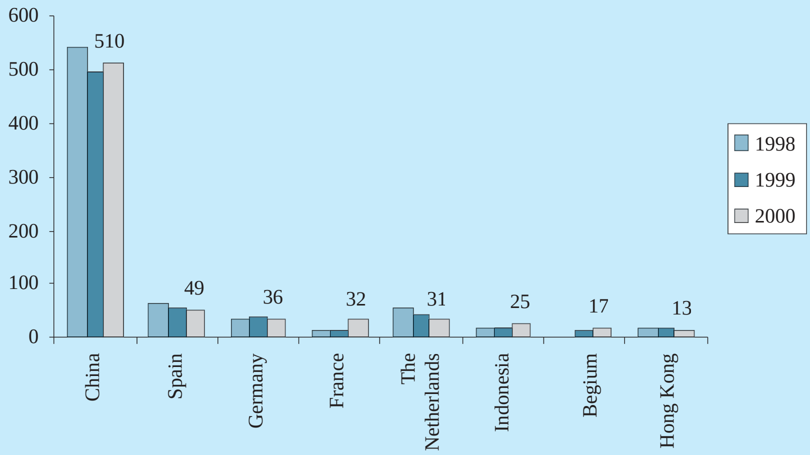
Since 1998, imports of dolls by EU member states decreased by 11 percent in value but increased by 5 percent in volume, amounting to US$ 783 million or 102 thousand tonnes in 2000.
The United Kingdom was the leading importer, accounting for 21 percent of the total imported value by EU member countries in 2000, followed by France (17%), Germany (16%), Spain (11%) and Italy (11%). In 2000, more than 70 percent of the imports (in value) of dolls by EU member countries originated in developing countries. China was the leading supplier, accounting for over 65 percent of the imports by EU member countries.

Table 5.5 Imports of dolls by EU member countries, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	880,918	96,529	798,902	753,681	92,633	783,283	851,395	101,548
United Kingdom	179,331	21,845	169,245	159,665	18,930	165,746	180,159	21,054
France	129,613	14,295	125,108	118,026	15,528	129,919	141,216	17,010
Germany	161,301	18,060	134,054	126,466	15,079	121,786	132,376	13,749
Spain	71,717	7,292	67,505	63,684	9,481	85,272	92,687	13,240
Italy	107,324	12,166	87,002	82,077	11,142	82,644	89,830	12,563
The Netherlands	58,971	6,933	57,050	53,821	5,987	59,220	64,370	6,758
Belgium	n.a.	n.a.	54,694	51,598	6,034	49,513	53,818	6,227
Portugal	24,874	3,045	21,410	20,198	2,626	20,015	21,755	2,301
Greece	14,918	1,756	13,073	12,333	1,874	16,509	17,945	3,615
Austria	16,670	1,360	18,022	17,002	1,651	12,930	14,054	1,043
Denmark	22,652	1,569	16,321	15,397	1,389	12,091	13,142	1,152
Sweden	26,480	1,838	18,280	17,245	1,698	11,521	12,523	1,400
Ireland	9,792	714	10,111	9,539	709	10,385	11,288	931
Finland	6,998	414	5,912	5,577	443	4,203	4,569	421
Luxembourg	n.a.	n.a.	1,117	1,054	62	1,535	1,668	84
Belgium & Luxembourg	50,272	5,242	-	-	-	-	-	-

Source: Eurostat (2001)

Figure 5.11 The leading suppliers of dolls to the EU, 1998-2000
US$ thousand



Source: Eurostat (2001)

TOYS IN SETS

In 2000, imports of toys in sets by EU member countries amounted to US$ 671 million (118 thousand tonnes), representing a decrease by 7 percent in value but an increase by 9 percent in volume since 1998. The leading EU importer was the United Kingdom, accounting for 25 percent of the imported value in 2000, followed by France (19%), Germany (17%) and Belgium (7%).

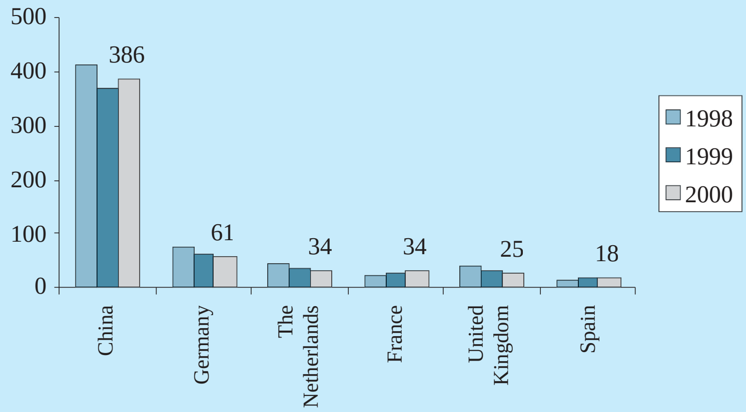
In 2000, 60 percent of the imported value of toys in sets was supplied by developing countries, which were almost entirely represented by China.

Table 5.6 Imports of toys in sets by EU member countries, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	719,190	107,585	661,853	624,390	107,854	670,842	729,176	117,663
United Kingdom	169,826	27,719	160,597	151,507	27,597	166,595	181,082	29,269
France	133,170	17,657	121,112	114,257	17,692	129,730	141,011	20,056
Germany	101,469	15,647	107,054	100,994	16,721	111,386	121,072	20,318
Belgium	n.a.	n.a.	49,806	46,987	6,636	46,947	51,029	7,053
Spain	46,745	8,023	43,629	41,159	8,363	45,514	49,472	10,554
The Netherlands	47,412	8,064	48,549	45,801	7,844	44,303	48,155	8,047
Italy	52,257	8,324	43,156	40,713	8,675	37,610	40,880	7,295
Austria	21,056	2,025	17,652	16,653	1,898	21,042	22,872	2,448
Ireland	28,687	3,390	20,570	19,406	4,317	16,290	17,707	3,141
Sweden	13,785	1,940	13,716	12,940	1,990	13,070	14,207	2,313
Denmark	17,833	2,374	14,011	13,218	2,102	11,674	12,689	1,896
Portugal	7,373	1,129	7,781	7,341	1,017	10,220	11,109	1,318
Greece	7,752	1,371	7,770	7,330	2,260	9,733	10,579	3,147
Finland	6,925	721	5,489	5,178	692	5,022	5,459	692
Luxembourg	n.a.	n.a.	960	906	50	1,702	1,850	116
Belgium & Luxembourg	64,901	9,201	-	-	-	-	-	-

Source: Eurostat (2001)

Figure 5.12 The leading suppliers of toys in sets to the EU, 1998-2000
US$ thousand



Source: Eurostat (2001)

CONSTRUCTION TOYS

In 2000, only 10 percent of the imported value of construction toys by EU member countries was supplied by developing countries. Between 1998 and 2000, total imports by EU member countries decreased by 23 percent in value and by 18 percent in volume, amounting to US$ 532 million or 48 thousand tonnes in 2000. Germany was the leading EU importer, accounting for over one third of total imports by EU member countries, followed by the France (12%), United Kingdom (10%) and Belgium (9%).

Most of the construction toys imports was supplied by EU member countries: 48 percent of the imported value in 2000 was supplied by non-EU countries. Switzerland was the leading supplier, accounting for 32 percent of the imported value in 2000, followed by Denmark (18%), China (10%) and Germany (5%).

GAMES OPERATED BY COINS

Although games operated by coins were among the leading imported products, this product group is not very interesting for developing country exporters, since only 7 percent of the imported value by EU member countries in 2000 originated in developing countries.

Since 1998, imports of games operated by coins decreased by 35 percent in value and by 15 percent in volume, amounting to US$ 526 million or 30 thousand tonnes in 2000.

The United Kingdom was the leading importer, accounting for 18 percent of the total imported value of video games, followed Spain (16%), Germany (11%) and Italy (9%). Next to being the leading EU importer, the United Kingdom was also the leading supplier of games operated by coins, supplying 25 percent of the imported value, followed by the USA (15%), Japan (10%), Austria (9%), Germany (8%) and China (6%).

ANIMAL TOYS

Animal toys are one of the most promising imported products for developing country exporters.
Not only have the imports in both value and volume increased considerably over the past years, also the share of value imports originating in developing countries increased from 55 percent in 1998 to 69 percent in 2000. The increase in the share of developing countries was largely to the advantage of China, which represented the leading supplier of animal toys to the EU.

Between 1998 and 2000, imports by EU member countries increased by 46 percent in value and by 57 percent in volume, amounting to US$ 420 million or 57 thousand tonnes in 2000.

The leading importer was the United Kingdom, accounting for around a quarter of the imported value, followed by Germany (19%), Italy (14%) and France (13%).

Table 5.7 Imports of animal toys by EU member countries, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	288,366	36,588	421,251	397,407	52,043	419,610	456,098	57,415
United Kingdom	66,052	9,089	109,334	103,145	13,487	98,783	107,373	12,184
Germany	59,501	6,695	87,060	82,132	10,354	81,170	88,228	10,140
Italy	35,194	5,037	50,478	47,621	7,863	56,860	61,804	8,727
France	35,007	4,303	54,413	51,333	6,040	54,849	59,618	6,847
Belgium	n.a.	n.a.	28,559	26,942	4,240	31,843	34,612	4,865
Spain	20,844	2,837	24,541	23,152	3,294	29,308	31,857	5,844
The Netherlands	16,293	2,924	25,039	23,622	2,586	24,822	26,980	3,348
Austria	7,968	542	11,297	10,658	988	11,169	12,140	1,050
Denmark	5,889	604	7,775	7,335	958	9,342	10,154	1,385
Sweden	10,661	710	7,196	6,789	725	5,690	6,185	898
Portugal	4,721	567	5,844	5,513	505	5,397	5,866	549
Ireland	3,759	330	3,949	3,725	322	3,893	4,232	316
Greece	2,044	241	2,266	2,138	331	3,081	3,349	685
Finland	2,593	302	2,961	2,793	288	2,059	2,238	230
Luxembourg	n.a.	n.a.	541	510	62	1,344	1,461	347
Belgium & Luxembourg	17,846	2,407	-	-	-	-	-	-

Source: Eurostat (2001)

Figure 5.13 The leading suppliers of animal toys to the EU, 1998-2000
US$ thousand

Source: Eurostat (2001)

MOTORISED SETS

In 2000, the imports of motorised sets by EU member countries amounted to US$ 412 million or 55 thousand tonnes, which represented an increase by 7 percent in value and by 8 percent in volume since 1998.

The leading EU importer was the United Kingdom, accounting for 24 percent of the imported value by EU member countries in 2000, followed by France (17%), Germany (17%) and Spain (9%).

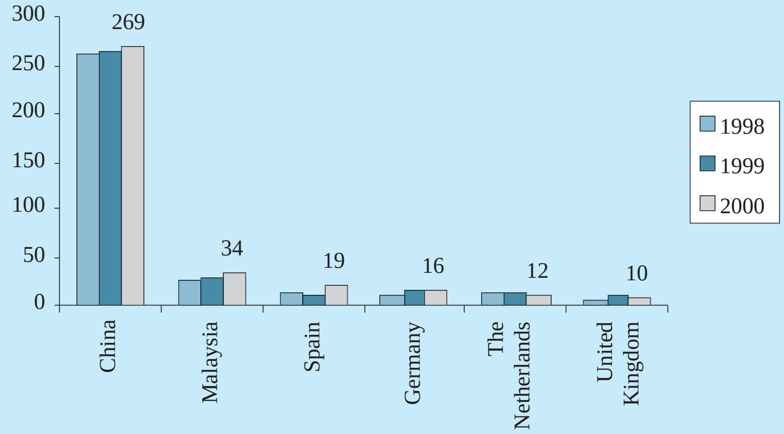
Around three quarters of the imports of motorised sets was supplied by developing countries. The leading supplier by far was China, accounting for 65 percent of total imported value in 2000.

Table 5.8 Imports of motorised sets by EU member countries, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	387,048	50,806	397,296	374,808	52,932	412,362	448,220	55,055
United Kingdom	67,165	9,555	82,740	78,057	11,188	99,854	108,537	13,485
France	67,502	7,862	65,668	61,951	8,239	71,622	77,850	8,928
Germany	76,451	8,526	78,509	74,065	8,906	69,645	75,701	7,833
Spain	41,657	6,870	39,358	37,130	6,852	36,301	39,458	5,934
The Netherlands	23,789	3,117	27,114	25,579	3,200	28,899	31,412	3,615
Belgium	n.a.	n.a.	17,713	16,710	2,332	21,843	23,742	2,703
Italy	31,440	4,471	22,619	21,339	3,505	21,663	23,547	3,172
Portugal	10,231	1,593	15,641	14,756	2,382	12,080	13,130	2,408
Greece	12,002	2,071	13,776	12,996	2,560	11,453	12,449	2,284
Sweden	9,157	1,109	9,445	8,910	1,107	10,486	11,398	1,213
Denmark	7,268	1,011	8,568	8,083	1,245	9,414	10,233	1,187
Ireland	5,691	381	6,367	6,007	502	9,177	9,975	1,319
Austria	5,713	445	6,429	6,065	579	6,694	7,276	637
Finland	3,386	354	2,889	2,725	303	2,713	2,949	302
Luxembourg	n.a.	n.a.	460	434	32	521	566	35
Belgium & Luxembourg	25,596	3,441	-	-	-	-	-	-

Source: Eurostat (2001)

Figure 5.14 The leading suppliers of motorised sets to the EU, 1998-2000
US$ thousand



Source: Eurostat (2001)

WHEELED TOYS

Between 1998 and 2000, imports of wheeled toys by EU member countries more than doubled in both value and volume, amounting to US$ 410 million or 72 thousand tonnes in 2000. The leading EU importer was France, accounting for 23 percent of the imported value, followed by the United Kingdom (19%), Spain (15%) and Germany (10%).

In 2000, the share of imports originating in developing countries amounted to 50 percent of the imported value, which was 25 percent more than in the preceding year.

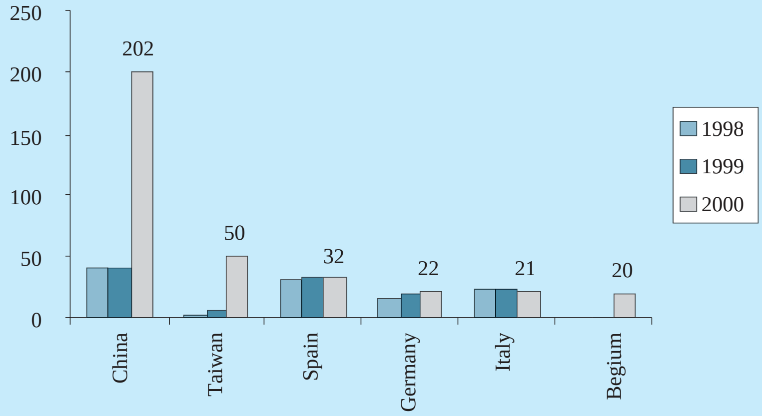
This increase was mainly caused by the increased supplies originating in China, which accounted for 65 percent of the total imported value in 2000.

Table 5.9 Imports of wheeled toys by EU member countries, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	166,497	33,434	173,673	163,842	36,386	409,762	445,393	72,156
France	31,238	4,848	31,192	29,426	5,181	95,293	103,579	12,713
United Kingdom	47,638	10,463	52,705	49,722	11,992	79,181	86,066	15,495
Spain	2,830	546	2,422	2,285	552	60,443	65,699	10,220
Germany	33,243	7,213	30,953	29,201	7,417	42,963	46,699	9,300
Belgium	n.a.	n.a.	9,607	9,063	1,611	32,733	35,579	5,144
Italy	4,300	889	4,957	4,676	1,083	30,067	32,681	5,387
The Netherlands	9,952	2,182	11,107	10,478	2,360	20,239	21,999	3,958
Austria	6,558	1,278	7,748	7,309	1,385	12,121	13,175	1,778
Denmark	4,243	887	3,463	3,267	769	8,224	8,939	1,538
Ireland	5,680	1,077	5,668	5,347	1,082	7,587	8,247	1,319
Portugal	3,520	586	3,959	3,735	720	6,535	7,103	1,116
Sweden	3,793	776	4,154	3,919	910	5,965	6,484	1,282
Greece	3,053	624	3,739	3,527	938	4,927	5,355	2,186
Luxembourg	n.a.	n.a.	742	700	125	1,742	1,894	379
Finland	1,063	215	1,257	1,186	261	1,742	1,893	341
Belgium & Luxembourg	9,388	1,850	-	-	-	-	-	-

Source: Eurostat (2001)

Figure 5.15 The leading suppliers of wheeled toys to the EU, 1998-2000
US$ thousand



Source: Eurostat (2001)

PLAYING CARDS

Compared to the preceding year, imports of playing cards by EU member countries increased by almost 5 times in both value and volume, amounting to US$ 267 million or 40 thousand tonnes in 2000. The leading EU importer was The Netherlands, accounting for 28 percent of the imported value, followed by the United Kingdom (27%), France (13%), Italy (10%) and Belgium (8%).

In 2000, 43 percent of the imported value was supplied by non-EU countries, of which only 5 percent originated in developing countries.
The leading supplier of playing cards was the USA, supplying 38 percent of the imported value in 2000, followed by The Netherlands (37%), Belgium (12%), Germany (3%), and China (2%).

MODEL ASSEMBLY KITS

In 2000, total imports of model assembly kits by EU member countries amounted to US$ 163 million or 16 thousand tonnes, representing a decrease by 8 percent in value but an increase by 5 percent in volume since 1998.
Germany was the leading EU importer, accounting for 21 percent of the imported value in 2000, followed by the United Kingdom (17%), France (14%) and Italy (13%).

Developing countries supplied around 16 percent of the total imported value by EU member countries. Besides being the leading EU importer, Germany was also the leading supplier of model assembly kits to the EU, supplying about 16 percent of the imported value in 2000, followed by Japan (16%), China (14%), Taiwan (7%), Hong Kong (5%) and the USA (5%).

TOY MUSICAL INSTRUMENTS

In 2000, the imports of toy musical instruments by EU member countries amounted to US$ 132 million or 18 thousand tonnes, representing an increase by 3 percent in value and by 13 percent in volume since 1998.

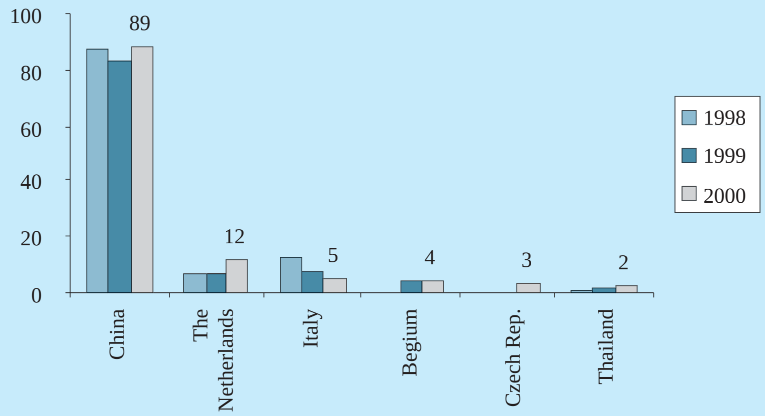
The leading EU importer was the United Kingdom, accounting for 27 percent of the total imported value by EU member countries in 2000, followed by France (21%), The Netherlands (13%) and Germany (12%).
The leading supplier by far was China, accounting for 67 percent of the total imported value in 2000, followed at a distance by The Netherlands (9%), Italy (4%) and Belgium (3%).

Table 5.10 Imports of toy musical instruments by EU member countries, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	128,937	16,154	118,864	112,136	15,204	132,456	143,974	18,214
United Kingdom	36,641	4,470	34,159	32,225	3,902	35,556	38,648	4,750
France	26,582	3,033	24,135	22,769	2,955	27,180	29,543	3,339
The Netherlands	12,462	1,474	16,970	16,009	2,208	17,513	19,036	2,587
Germany	10,833	1,295	10,646	10,043	1,376	15,265	16,592	2,441
Spain	8,261	1,201	7,824	7,381	1,306	9,311	10,121	1,480
Italy	15,939	2,502	9,618	9,074	1,557	8,411	9,142	1,357
Belgium	n.a.	n.a.	5,554	5,240	672	8,332	9,057	884
Denmark	1,262	151	1,748	1,649	248	2,582	2,807	327
Portugal	2,224	241	2,383	2,248	285	2,183	2,373	265
Sweden	1,789	195	1,260	1,189	158	1,701	1,849	248
Austria	1,617	145	1,481	1,397	149	1,370	1,489	136
Greece	1,197	167	858	809	131	1,195	1,299	184
Ireland	1,233	144	1,444	1,362	159	1,080	1,174	104
Finland	650	64	513	484	54	471	512	63
Luxembourg	n.a.	n.a.	270	255	44	309	336	49
Belgium & Luxembourg	8,248	1,072	-	-	-	-	-	-

Source: Eurostat (2001)

Figure 5.16 The leading suppliers of toy musical instruments to the EU, 1998-2000
US$ thousand



Source: Eurostat (2001)

ELECTRIC TRAINS
Compared to the preceding year, imports of electric trains by EU member countries decreased by 6 percent in value but increased by 13 percent in volume, amounting to US$ 110 million or 7 thousand tonnes in 2000.
The leading EU importer was Germany, accounting for 39 percent of the imported value, followed by the United Kingdom (17%), Austria (10%) and France (9%).

In 2000, the share of imports originating in developing countries amounted to 22 percent of the imported value, which represented an increase by 4 percent since 1998. The leading supplier of electric trains was China, supplying 20 percent of the imported value in 2000, followed by Germany (19%), Austria (18%), Hungary (7%) and Italy (5%).

PUZZLES
Compared to the preceding year, imports of puzzles by EU member countries decreased by 6 percent in value but increased by 11 percent in volume, amounting to US$ 103 million or 28 thousand tonnes in 2000.

The leading EU importer was Germany, accounting for 31 percent of the imported value, followed by the United Kingdom (25%), France (12%) and The Netherlands (8%).
The share of imports originating in developing countries increased from 13 percent of the total imported value in 1998 to 28 percent in 2000.
The leading supplier of puzzles was China, accounting for 23 percent of the total imports, followed by France (15%), The Netherlands (12%), Germany (12%) and Italy (5%).

ARTICLES FOR BILLIARDS
Between 1998 and 2000, imports of articles for billiards by EU member countries decreased by 6 percent in value but increased by 17 percent in volume, amounting to US$ 42 million or 10 thousand tonnes in 2000.
The leading EU importer was the United Kingdom, accounting for 31 percent of the imported value, followed by Germany (15%), France (12%), The Netherlands (10%) and Italy (7%).

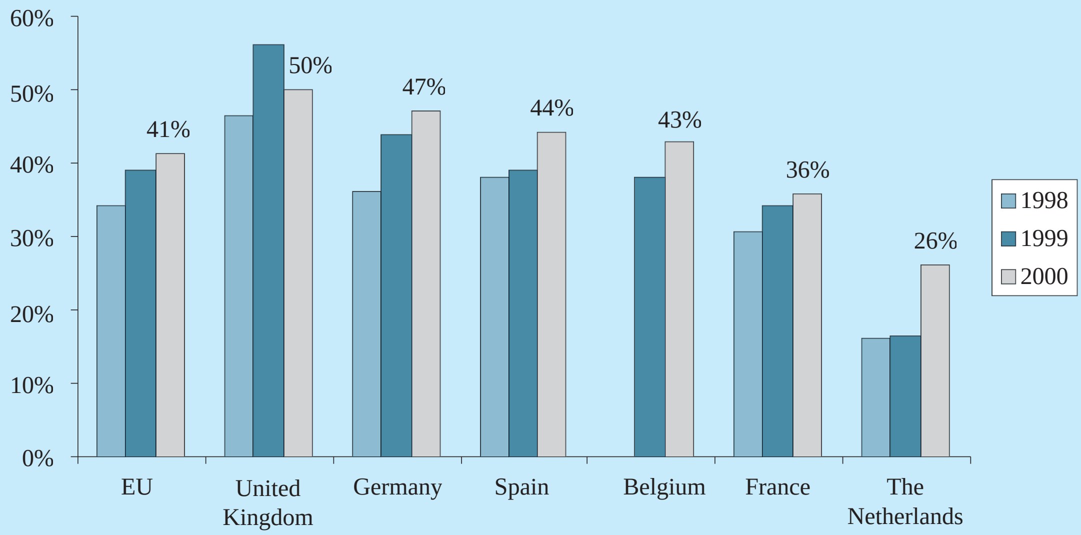
In 2000, 61 percent of the imported value was supplied by non-EU countries, of which 55 percent originated in developing countries. The leading supplier of playing cards was China, supplying 32 percent of the imported value, followed by Taiwan (12%), the United Kingdom (9%), the USA (8%), and Belgium (7%).

5.3 The role of the developing countries

Imports of toys and games originating in developing countries increased by 26 percent in value and by 32 percent in volume between 1998 and 2000, amounting to over US$ 4.4 billion or 615 thousand tonnes in 2000. Developing countries played a relatively more important role in imports into the United Kingdom and Germany than in imports into other EU member countries.
The share of developing countries in imports into the selected EU countries increased continuously during the years 1998 and 2000, except for imports into the United Kingdom.

Developing countries mainly supplied stuffed animal toys and playing cards to the EU. Other important products were motorised sets, dolls, toy musical instruments and animal toys.

Figure 5.17 Share of developing countries in imports of toys and games into the selected EU countries, 1998-2000
% of imported value



Source: Eurostat (2001)

Note: 1998 figure for Belgium is not available.

Developing countries were mainly represented by Southern Asian countries, with China by far in the lead. Many developing countries are facing increasing competitiveness and difficulties to export to the EU market.

Large toy exporting countries such as China and other Far Eastern countries are nowadays also competing with the Baltic countries, of which the latter have some advantages in terms of distance and knowledge of the market.

The leading suppliers of toys and games to the EU (share of the total imported value in 2000)		**Total share DC**
wheeled toys	China (98%), Thailand (1%)	50%
dolls	China (91%), Indonesia (5%), Malta (2%)	71%
electric trains	China (91%), Slovenia (6%), Thailand (2%)	22%
model assembly kits	China (87%), Philippines (4%), Slovenia (3%)	16%
construction toys	China (93%), Thailand (4%), Slovenia (1%)	10%
stuffed animal toys	China (88%), Indonesia (6%), Vietnam (3%)	78%
animal toys China	(95%), Vietnam (1%)	69%
toy musical instruments	China (97%), Thailand (3%)	69%
puzzles	China (82%), Thailand (6%), Indonesia (4%)	28%
toys in sets	China (95%), Thailand (2%), Vietnam (1%)	60%
motorised sets	China (87%), Malaysia (11%)	75%
miscellaneous toys	China (89%), Thailand (4%), Malta (3%)	55%
video games	Indonesia (53%), China (46%)	6%
articles for billiards	China (94%), Indonesia (4%)	34%
games operated by coins	China (87%), Slovenia (8%)	7%
playing cards	China (89%), India (6%), Thailand (6%)	2%
other games	China (95%), Malaysia (2%)	29%
toys and games	**China (90%), Indonesia (3%), Thailand (2%)**	**41%**

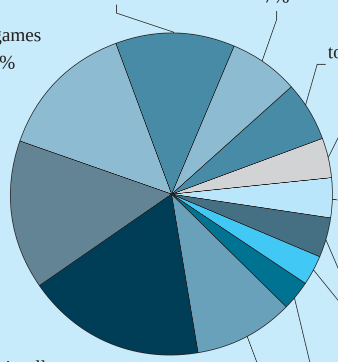
6 EXPORTS

In 2000, the EU member states together exported about US$ 5 billion of toys and games, representing a decrease by 8 percent compared to 1998.
In terms of volume, the EU exports decreased by a considerable 60 percent between 1998 and 2000, amounting to almost 0.5 million tonnes in 2000. High volume export in 1998 was mainly caused by Spain, which had greatly expanded its exports.

The largest exporter of toys and games in the EU was Germany, accounting for 23 percent of the total exported value by EU member countries in 2000. Other key exporting countries were The Netherlands (15%), the United Kingdom (14%), Italy (10%) and Spain (9%).

The most important single categories were miscellaneous toys, video games, other games, games operated by coins, stuffed animal toys and toys in sets. It should be noted that a very large proportion of recorded exports was actually merchandise originally produced in the Far East and imported into one EU country before being re-exported to other EU markets.

Figure 6.1 EU exports of toys and games, 2000
% of total value



Source: Eurostat (2001)

Table 6.1 Exports of toys and games by the EU, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	5,451,593	1,277,635	5,229,643	4,933,625	545,439	5,032,471	5,470,077	498,001
Germany	1,124,791	74,001	1,088,666	1,027,043	77,758	1,161,920	1,262,956	86,994
The Netherlands	893,939	63,224	863,324	814,457	64,703	767,485	834,223	55,404
United Kingdom	887,117	58,177	843,946	796,175	128,788	726,793	789,992	51,523
Italy	636,956	93,291	540,757	510,148	80,249	481,364	523,222	84,728
Spain	492,762	852,542	460,610	434,538	51,354	468,269	508,988	59,862
Belgium	n.a.	n.a.	419,214	395,485	44,903	462,919	503,173	55,640
France	425,646	47,328	410,630	387,387	47,999	446,249	485,053	58,583
Austria	228,518	9,600	269,370	254,123	10,449	211,603	230,003	9,828
Sweden	107,128	7,200	98,494	92,919	9,556	95,837	104,171	7,890
Denmark	65,824	7,853	76,261	71,944	8,367	76,734	83,406	9,081
Ireland	118,462	18,299	76,985	72,627	14,223	64,779	70,412	12,492
Finland	24,059	1,829	26,746	25,232	2,112	19,990	21,728	1,936
Greece	16,435	1,363	15,209	14,348	967	18,508	20,117	1,235
Portugal	20,530	2,107	21,254	20,051	1,688	17,994	19,559	1,509
Luxembourg	n.a.	n.a.	18,192	17,162	2,323	12,034	13,080	1,296
Belgium & Luxembourg	409,438	40,821	-	-	-	-	-	-

Source: Eurostat (2001)

7 TRADE STRUCTURE IN THE EU

On a global level, trading of toys takes place within the context of a highly structured and/ or controlled supplying industry. However, there is often a German or American company behind a "Made in China" product. It is not unknown for EU toy importers to go to Asia to buy toys manufactured in a German factory. The leading toy distributors, the department stores, maintain purchasing offices in South-East Asia, especially in Hong Kong. Suppliers from South-East Asia are less prominent in central and Scandinavian countries than in the United Kingdom and France, where they amount to nearly two third of the supplying industry.

The toy trade is normally well informed about every new trend in the market. As a consequence the industry is characterised by the fact that every new, successful product is rapidly copied, with numerous varieties appearing in different parts of the world. However, one should realise that manufacturers producing for markets highly determined by fashion and trends leave niches for other toys and games. Since toys and games are wide-ranging, niches remain in existence. Moreover, toys and games are sold in many types of outlets and hence distributed in many different ways.

7.1 EU trade channels

Retailing of toys and games ranges from specialised outlets, for which toys are the primary business, to shops in other sectors like petrol stations, chemists and railway stations, for which toys form a very minor part of their assortment. In Table 7.1 the most important retailing outlets within Europe are distinguished and presented according to their market share of toys and games. Since the data include East European countries, the data should be taken only as indications.

The main importers of toys in Europe are the following six: Vedes-group, Toys"R"Us, Blokker, Metro, Karlstadt and Carrefour. Some of these importers supply speciality stores and some supply self-service stores.

7.2 Distribution channel for developing country exporters

Patterns of import, stock, purchasing and retailing activities are to a large extent determined by the presence or absence of brands and private labels or licensing on products. Therefore, it is useful to distinguish between branded and unbranded products, when describing the distribution of toys and games in EU countries.

Brands and merchandising

A characteristic of the distribution of toys and games that largely holds true for branded toys has been the degree of concentration of the supplying industry. Some of the largest suppliers of branded toys are e-Toys ; Hasbro; GameFever; Mattel; SmarterKids; TOYS-GIFTS; Toys "R" Us. Branded products are mediated through representatives of department stores and central buying companies or commission agents. Representatives of warehouses usually prefer to deliver their branded goods directly from their own stores.

On the contrary, agents work on commission and only sell the goods on the customer's orders for direct delivery. Agents today are focusing more on exclusivity in branded toys like Mattel, Fischer Price, Märklin etc. for a number of reasons:

- Higher price levels and hence higher margins
- Fewer problems with safety and quality
- Better marketing back-up
- More reliable supply

Table 7.1 Regional toy sales by channel of distribution, 2000
% of value

	Toy Chains	General Merchandise (including Hypers & Discounters)	Toy, Hobby & Game Retailers	Department Stores	Food, Drug and Misc. Outlets	Catalogue Sales	E-Tailers
North America	21%	45%	8%	4%	15%	6%	2%
Europe*	33%	30%	13%	11%	9%	3%	0%
Asia	24%	24%	30%	13%	8%	0%	0%
Latin & South America	16%	41%	21%	15%	8%	0%	0%
Oceania	15%	50%	20%	6%	7%	2%	0%
World	**24%**	**37%**	**14%**	**8%**	**12%**	**4%**	**1%**

Source: ICTI (2002) ** Note: Europe includes Eastern countries*

As toys and games are mediated thought different distribution channels, one should consider the possible ways of exporting to the EU.

Most department stores are members of chains and have a centrally organised buying department that sometimes is established in supplying countries. Large formula retailers, as well regular retailers, do their business at trade fairs. They send out buyers to negotiate with exporters in the supplying country. Regarding individual importers in the EU, it could be profitable to join a buying group so as to be able to buy all stock through the group, which should make estimating the cost of import a little easier.

Importers usually buy more products before Christmas, since shops often make over half their annual sales just before Christmas. To cope with demand importers will have to order extra stock and, consequently, have higher stock costs at this time of year.

Compared to the branded sector, the supply of unbranded toys is concentrated to a lesser extent.
In the unbranded toys segment, imports take place partly via wholesalers and partly directly from the suppliers. To a lesser extent, commission agents also operate in the trade of unbranded toys.

Vertical integration within the supplying industry
Important developments in the toy industry have been vertical integration within the supplying industry and the rise of private labelling. A number of distributors, usually (linked to) department stores push competitors out of the market by establishing agreements with toy manufacturers and thereby obliged manufacturers to supplying a certain quantity exclusively to them, hence preventing them from supplying other retailers.

This trend of vertical integration started in the 1980's. It has increasingly cut out intermediaries and it is common among by large retailers such as Toys" R" Us, Mattel and Hasbro. The agreements have the effect of eliminating competition that would have driven the companies to lower their prices.
As a consequence, these large retailers gain on profit that would otherwise be benefited by department stores or intermediaries.

For example, in autumn 1998, the Federal Trade Commission of the United States reported Toys "R" Us average margins were close to 30 percent above cost since it had prevented manufacturers from supplying other distributors. At the same time, warehouse clubs sold toys at prices as low as 9 percent above wholesale costs.

Ownership: private labelling
A trend which emerged simultaneously with the vertical integration trend was the rise of private labelling.
In addition to major international brands, private labels also exercise a very powerful influence on the purchase of toys and games.

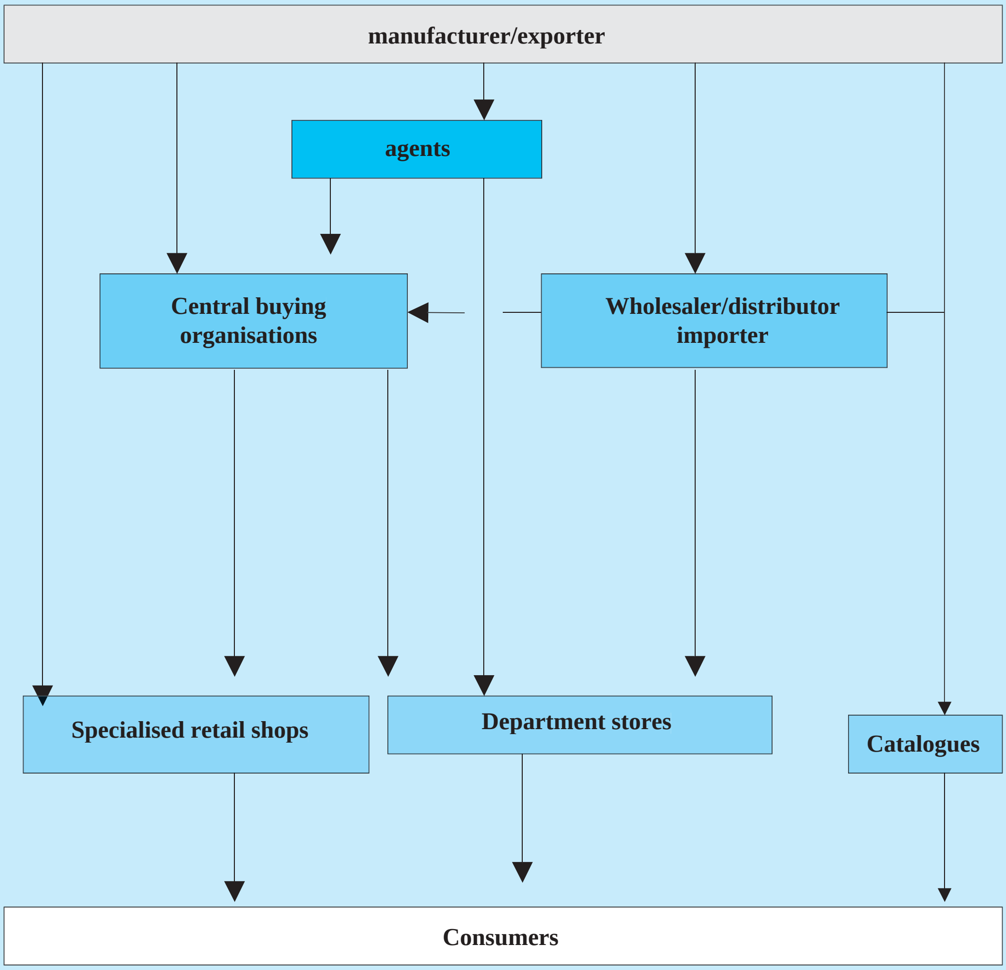
Large retailers, such as department stores and supermarkets with established names, have increasingly established direct contact with producers so that the latter place the retailers' brands on the products manufactured. This development has meant a short-cut in the marketing chain. Nowadays, sales of private label brands account for more than 15 percent of the supermarket sales in The Netherlands. In neighbouring countries, the figure may even exceed 20-25 percent.

Introducing and maintaining a brand name in Europe requires physical presence in the target markets and budgets for promotional campaigns. Many small and medium-sized companies in developing countries are not in this position. However, since private labelling is a trend that is forecasted to yield success, it provides opportunities for manufacturers in developing countries.

Use of Internet
Internet could, in a way, stimulate emancipation in the toy market. By using Internet one can make inquiries on trading opportunities and try to establish contacts. The opportunities for establishing agreements through Internet have cut-back effects on the cost side of supplying companies: companies set out direct lines with importers in the EU and thereby reduce the handling of products and, consequently, limit the value adding of their goods.

There are Internet sites that offer meeting places for companies and opportunities for establishing contacts between exporters and importers (e.g. www.BizEurope.com).

Figure 7.1 Distribution chain of toys and games



Germany

In 2000, specialist retailers represented the most significant retail channel for traditional toys and games, accounting for 40 percent of total sales, unchanged since 1996. During the review period, department stores managed to increase their market share, from 18 percent to 21 percent. They sought to reverse their loss of profit in a range of consumer markets by an extensive campaign of remodelling and renovating their stores. Consumers appreciated the new store concepts which comprised a clearer layout of attractive in-store boutiques, with greater emphasis on customer service.

Table 7.2 Value shares of traditional toys and games by retail format, 1996/2000
% value

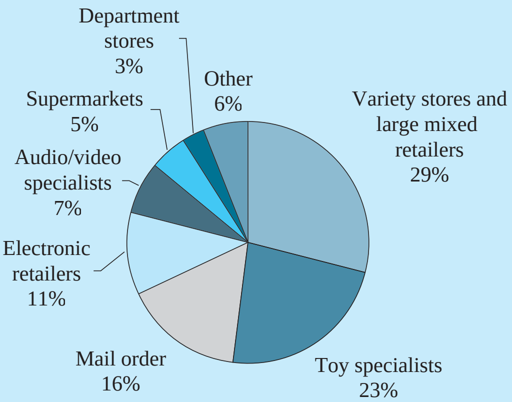
	1996	2000
Toy specialist	40	40
Department stores	18	21
Others	16	15.5
Supermarkets/hypermarkets	10	9
Variety stores	8	7
Mail order	8	6
Internet	0	1.5
Total	**100**	**100**

Source: Euromonitor (2001)

UK

Variety stores such as Woolworth's were the largest distributors of toys and games in the UK in 2000, with 29 percent of the market in value terms and 47 percent of the traditional toys market.
Toy specialists ranked as the second most important outlet for traditional toys and games in the UK with 23 percent of value sales. Specialists saw their share eroded by both variety stores and in particular by the rising number of supermarkets, which complemented their core trade by stocking a selection of traditional toys and games. This category incorporates both large international and national chains such as Toys R Us, Early Learning Centres, Toyworld, Hamleys and The Entertainer, as well as independents including members of Toymaster and Youngsters buying groups.

Figure 7.2 Value shares of traditional toys and games by retail format, 2000



Source: Euromonitor (2002)

In the console and computer games sector, direct sales witnessed a dramatic increase over the review period to take pole position in 2000. As from 1996, their share rose from 16 percent to 29 percent of console and computer games sales. Electronic retailers emerged as the second largest computer and console games distributors in 2000 accounting for 11 percent of total sales, up from 14 percent in 1996. Customers were attracted by the huge product portfolio, the opportunity for one-stop shopping for their home electronic needs and competitive pricing.

France

The traditional toys and games sector is dominated by the grocery channel, which takes 50 percent of sales, although several specialist toy shops accounted for 30.6 percent of value sales in 2000. The latter frequently benefit from membership schemes which encourage customer loyalty.

The only hypermarkets that have managed to represent serious competition for the large successful US outfit Toys 'R'Us, are the largest: Carrefour, Auchan and LeClerc. The channel has lost one percentage point in share since 1999, as specialist toy shops proliferate, and as promotional prices and discounts following Christmas made unit prices comparatively lower in hypermarkets. The growing success of specialist toy chains has impacted on department stores, which saw their share decline from 4 percent to 3 percent in 2000.

Table 7.3 Value sales of traditional toys and games by retail format, 1996/2000
% value

	1996	2000
Supermarkets/Hypermarkets	51.0	50.0
Toys specialists	28.4	30.6
Others (*)	12.8	13.0
Department stores	4.0	3.0
Mail order	3.8	2.9
Internet	neg	0.5
Variety stores	neg	neg
Total	**100.0**	**100.0**

Note: (*) others include discount outlets and market stalls
Source: Euromonitor (2001)

Spain

Toys specialists represented the leading distribution format for toys and games in 2000, with a market share of almost 59 percent, indicating an increase of 15 percent compared to the previous year.
Growth was partly due to small scale toy specialists, but also to the growth of category killers, notably Toys R Us. Small scale stores benefited from the strength of buying groups, such as JAC, which leveraged their buying power and allowed them to compete effectively against large scale businesses.

Both supermarkets/hypermarkets and departments stores lost market shares as a result of an increase in toy specialists. Department stores were a major force in toy retailing, with 14 percent of total sales.
Most had a broad selection of goods, supported by regular promotions. However, their generally higher price policies led to sliding sales, as consumers used them to browse toy selection, after which they completed the purchase at a lower cost outlet.
Supermarkets and hypermarkets, although losing share against toy specialists, showed greater optimism due to their prices.

Other retail channels such as the Internet and mail order experienced only negligible sales in 2000. However, several companies and the principle trade organisation worked to increase the importance of e-commerce within the sector.

Table 7.4 Value sales of traditional toys and games, 1996 and 2000 % value

	1996	2000
Toy specialists	43.9	58.7
Supermarkets/hypermarkets	36.4	26.7
Variety stores	2.0	2.0
Department stores	14.0	7.0
Mail order	1.0	1.2
Internet	neg	0.3
Others	2.7	4.1
Total	**100**	**100**

Source: Euromonitor (2002)

The Netherlands

The market for toys and games in The Netherlands is somewhat different from that in other EU countries. This is a result of the high concentration of certain formula stores in two retail groups. In other European countries distribution is less concentrated than in The Netherlands.

Retailing

On 1 January 2001, 1,415 companies (of which 65 ambulant trade) with 1,772 shop were registered at the Office for Central Registration (CRK) and qualified as specialist outlets for toy and games in The Netherlands. The number of outlets has remained relatively stable growth in recent years.
The Netherlands Central Statistics Office (CBS) listed 964 companies in 2000. Toys shops control about 34 percent of the total toy sales. Household stores enjoy an estimated 13 percent share of the toy market. Most of these stores in The Netherlands belong to multiple chains of franchise groups.

The three largest chains of retailers in the Netherlands are:

- Blokker BV (Intertoys, Blokker, Toys R Us, Bart Smit)
- Otto Simon BV (Wigwam, De Speelboom, Techno Hobby, Early Learning Centre)
- Vendex KBB (Vroom & Dreesmann, De Bijenkorf, Hema)

Blokker BV has a market share of 55 percent, Otto Simon BV 25 percent, and Vendex 10 percent. The remaining 10 percent is shared by some 260 independent retailers, who sell games, computer games or wooden toys. Other outlets selling toys include market stalls, supermarkets, chemists, radio and television shops, computer shops, gift shops, record shops, tobacconists, petrol stations and mail order catalogues.

As mentioned earlier, Otto Simon BV accounted for 25 percent of the toy market and is the largest buying group of independent toy shops in The Netherlands. It includes Top 1, formerly known as Speelboom and Techno Hobby formula, that has 42 speciality stores of (train)model constructions in The Netherlands. All in all, out of the 904 stores which are specialised in toys and games, some 732 work under the same umbrella whereby the 'formula' is similar. In June 2001, it was announced that Remus Holding GmbH from Filderstadt-Bonlanden (Germany) had taken over 75 percent of Otto Simon BV. For more information on Otto Simon BV, please refer to http://www.bizzcontact.com/en/who.jsp?action=viewProfile&l=&u=&p=1273.

The large multiples and buying groups import substantial quantities of toys directly from the producers. The toy items tend to be cheaper and the purchases are negotiated either directly with the factories or through a commission agent.
The sales offices of major promoted brands negotiate shelf space and promotional campaigns for their product ranges with the central buyers of the major groups. They distribute the merchandise to the central warehouses of these groups and directly to toy shop customers. Direct imports by individual shops are less frequent and occur mainly as a result of a trade fair or factory visits to factories abroad.

Other retail groups

In The Netherlands, there are only three central buying organisations which are not affiliated with the dominant formula shops.

These smaller retail groups include *Interring*, a buying co-operative with some 70 member toy shops and *Quintessence*, a small buying co-operative with 17 member toy shops specialised in wooden and traditional natural toys. The addresses of these central-buying companies can be obtained in Appendix 10.

Furthermore, there is the retail organisation of fair trade shops. *Fair Trade* is a central buying co-operative that imports merchandise from producers in developing countries guaranteeing them basic prices that are set beforehand.

Toys purchased by *Fair Trade* must meet the same legally required safety and quality standards as all other toy imports, but are sold directly through the approximately 450 Fair Trade shops in The Netherlands.

Summing up a number of significant features differentiate the retail toy trade in The Netherlands from that in most other European markets:

- The major share of the trade is controlled by specialist toy shops;
- The overpowering dominance of the Blokker group and its companies, which now effectively controls 70 percent of the Netherlands toy market.
- Independent retailers which buy centrally are insignificant. From this, it follows that prices are lower than in other EU countries.
- Purchasing decisions are made centrally by the big retail groups, most major brands have their own sales offices in the Benelux, and the role of independent toy shops is now very small.

Mail order sales of toys and games are not very significant in The Netherlands. There is only one major Netherlands mail order catalogue, Wehkamp. Netherlands versions of two major German catalogues, Neckerman and Otto, are also widely circulated to Netherlands households, but the sourcing and purchasing of merchandise is carried out by the German buying offices.

8 PRICES AND MARGINS

8.1 Prices and margins

As explained in Chapter 7, toy retailers can greatly influence prices and margins. Since there are no binding price maintenance agreements for toys and games "Big Ones" that sell large quantities dictate the price. Smaller toy shops only survive if they specialise in niche products from small game publishers, however, these are very often also trend setting.

It should be noted that an exporter can have a great influence on the retail price by focusing on rational production, thereby reducing the cost prices.
Each reduced percent in the cost price will result in a reduction in the retail price by 4 to 5 percent.
The retailer therefore can be encouraged to promote the toy selling for a price of US$ 4.99 instead of US$ 5.50.

Other factors influence prices as well. Wages, salaries, rent and other overhead costs differ among the EU countries. Consequently the margins in the trade channels vary as well.

The lower priced an item is, the higher mark-ups tend to be. The difference between landed costs (CIF price, landing costs, import duties, VAT duties) and retail price can be up to between 300 percent and 500 percent. Conversely, a high priced item under strong competition may have considerably lower mark-ups. In another way, mark-ups are determined by international trade arrangements. Mark-ups for some toy items could increase if prices drop as a result of free trade gains.

Brands and property rights, too, influence price margins in the toy and games sector. Partly this is because trade in branded toys and games is different organised in a different way from unbranded toys and games.
Fashion also influences the sale of branded products. Since private labelling is a trend that is forecasted to expand, there are genuine opportunities for manufacturers in developing countries to use this mechanism.

Furthermore, exporters should take note that prices and benefits largely result from the quality of the toy.

The prices of toys and games in the shops in The Netherlands are very low relative to other EU markets. In recent years, they have become even cheaper in comparison to other consumer goods. However, after a few years of decreasing, the prices of toys and games increased again in 1997.
In general, the price is the key criterion which determines purchasing decisions. Major brands and discount lines both depend on low/competitive prices to attract consumer interest. Even in the most important selling period of November to December prices are discounted, so that trade margins and profits are continuously under pressure.

Margins
The margins for the different intermediaries in the trade structure are difficult to determine because they are influenced by many factors, such as:

- Size of the order
- Length of the distribution chain
- Quality of the product
- Availability of the product
- Added value

Pricing method
Toys manufactured in the EU and EEA member countries are imported free of duty, whereas shipments from the U.S. and other non-member countries will be charged a Customs duty (levied per 100 kilograms of gross weight). Imported goods are also subject to VAT, value-added tax. VAT rates in EU vary from 12 to 22.5 percent . For more detailed information, please refer to Section 1.2.2 of CBI's "*EU Strategic Marketing Guide Toys and Games*". In the Netherlands, the rate is 19 percent. The VAT is levied at the border and is usually prepaid by the Customs broker/freight forwarder who maintains an account with the Customs Administration.

The various distribution channels described set the scope for the margins on the traded goods. Importers/distributors usually work with a margin of 20-25 percent on their own landed price of goods. The profit margin of the retailer from the purchasing price is again about 20 to 25 percent, and can be even somewhat higher. Retail mark-ups tend to change frequently in response to (anticipated) price changes by competitors. Suppliers, even of major promoted brands, are not in a position to enforce any adherence to the recommended retail mark-up or price for a particular item.

When the manufactured goods are handed over to the buyer, the pricing method usually runs as follows:

Figure 8.1 Indication of pricing method

FOB price	**25**	**% +**
Domestic handling/ transport	5	%
Transport/ Insurance	15-20	%
Import duties	5-10	%
Wholesaler margin	20-25	%
Retail margin	20-50	%
Consumer price	**100**	**%**
(VAT included)		

From the calculation as indicated in Figure 8.1 it follows that, for the exporter to calculate his profit, a FOB price has to be multiplied by about 3 to 4 times to calculate the consumer price in US$.
Trade contacts have indicated that the normal retail prices should be between 2 and 2.2 times the CIF price, but that the factor is often 1.8 or lower. The multiplier varies according to different factors, such as import duties and the exchange rate of the dollar or euro.
The euro will be implemented as the EU currency, except for the UK, Denmark and Sweden from January 2002. The introduction of the euro has had no effect on the prices of toys and games. This is because the trade in US$ is so well established all over the world that it will take several years before the euro will be used outside the EU.

In The Netherlands, prices have long been the biggest problem in the toy trade. Retail prices are far lower than in the neighbouring EU markets and, in recent years, have also declined relative to other consumer goods. Between 1990 and 1995 the average prices of Netherlands consumer products rose by 14.5 percent, but the prices of toys increased by only 7 percent.
After a small decline during 1995 and 1996, the prices of toys showed a small increase in 1997 and have remained stable ever since as a result of the concentration in the supplying industry.

Prices are key criteria on which choices are made between competing toy and game products. To a large extent, margins on toys and games differ according to the type of item. It is not uncommon to find teddy bears made in Germany being sold at 10 times the price compared to a teddy bear of the same size and play value made Sri Lanka.

8.2 Sources of price information

As prices of toys and games can fluctuate strongly, it is important to have continuous access to up-to-date price information. Individual importers can provide this information (for contact details, please refer to Appendix 10). Other sources of price information are the international publications listed below (for contact details refer to Appendix 3).

Retail prices can furthermore be found in trade magazines, promotional material, catalogues and on various Internet sites as mentioned in Appendix 11. However, the end prices will always depend to a certain extent on the negotiations between exporter and importer.

Magazine sources of price information:

- Das Spielzeug
- Speelgoed + Hobby
- Toy Trader

9 OPPORTUNITIES FOR EXPORTERS

At the time of a general slump in consumption, the toy industry becomes characterised by a mood of optimism and creativity. Industry and trade are about to face new challenges: the toy industry has to face the task of developing new products through creativity generating impulses for the market.
The steadily decreasing birth and rate and falling sales figures have intensified competition in the trade, whereas increased efforts of the sports and leisure sectors have attracted additional demand.

Trade data reveal that developing country exporters have a strong position in EU imports of the following products groups:
- stuffed animal toys
- motorised sets
- toy musical instruments
- dolls
- animal toys

Developing country exporters should keep in mind that the European toy and game market requires high quality products, which have to comply with European Safety Standards.

One of the best way to obtain knowledge and understanding of the EU toy market is to visit the Nuremberg Toy Fair. In a few days, a potential exporter can get an overview on the different ranges of toys, quality levels, designs, construction, fashion and competition. This fair is an eye-opener in many ways and also offers an excellent opportunity to make contact with importers etc.

For addresses of trade fair organisers and importers, please refer to Appendices 5 and 10.

Purchase routines by importers
The seasonally factors, as explained in chapter 3, evidently influence the purchasing routines in trade. The lead-time for wholesalers' and multiple store companies' product-range decisions is about 12 months. Retailers do their basic purchasing four to six months ahead of each season. This means that wholesalers, multiple store and buyers companies arrange their purchasing trip abroad in compliance with the market peaks. These trips usually have their destiny in the Far East. This is because large importers usually have established contacts and have their horizon set in a particular region. However, (smaller) importers could well be open for new toy items. Exporters in developing countries should therefore become familiar with the purchasing routine of importers in European countries.

Implications for exporters in developing countries
For exporters in developing countries to sell on the EU market, two viable ways remain.
1. The central buying organisations formula
2. Independent retailers who:
   - are members of central buying companies (and buy in stock)
   - might have an agent in a foreign country (and buy in stock)
   - or do the buying individually and directly
   - are interested in establishing co-makership

The best long-term strategy for a new prospective exporter to the market is to seek a partner who is well acquainted with the market situation. This partner could be a central buying company that is able to assess the product in co-operation with its members (retailers). Though the formula buying companies and buying companies of independent retailers supply different markets, they work in similar ways and do business at trade fairs (both in Europe and in the Far East).

In the case of the retailer having an agent, the exporter deals with him. The agent has to recommend to the exporter whether merchandise should be supplied directly from his factory to the central warehouse of the customer (retailer) or supplied to him as importer. In the latter case, the importer assumes responsibility for further distribution himself.

In addition, manufacturers aiming at exporting to the EU are recommended to think of some kind of licensing to establish ownership. In co-operation with an independent retailer, an exporter could strive at attaining a market share and consequently be able to establish his production capacity. As private labelling is a trend that is forecasted to yield success, there are prospects for manufacturers in developing countries to take advantage of in this instrument.

Co-makership
Some kind of ownership of products can effectively be worked out by way of co-makership. A co-makership constitutes an agreement for the two business partners to operate as a team, whereby it is in the interest of the buyer to assist the manufacturer. It could well be in the interest of the manufacturer to have a buyer in the EU, because there are a lot of regulations related to quality, environment, safety and free trade now being negotiated but which are not clear-cut. Having a buyer who is well informed about those developments is a means for the manufacturer in a developing country to come to terms with complying with the rules and regulations in force in the European Market.

Therefore co-makership could be an effective strategy to comply with the changing regulations in the EU.

Co-makership is said to replace the traditional buyer-seller relationship, for instance in the field of retailing in department stores, supermarkets and do-it-yourself outlets.

Buying companies and importers could also be approached at the initiative of the manufacturer. For contact details, please refer to the addresses in Appendix 10.

Toys for the EU markets are purchased by highly skilled and professional buyers. CBI's EU Strategic Marketing Guide "Toys and Games" provides exporters of toys and games in developing countries with practical step-by-step advice for approaching the European market.

APPENDIX 1 DETAILED IMPORT/EXPORT STATISTICS

The source of the data presented below is Eurostat COMEXT 2001.

IMPORTS

Imports of toys and games by EU member countires, by country of origin, 1998-2000
US$ million / € million/ thousand tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	10,384	1,996	10,311	9,728	1,197	10,722	11,655	1,162
Extra-EU	6,316	623	6,386	6,025	688	6,822	7,415	770
Developing countries	3,531	467	4,014	3,787	534	4,445	4,831	615
Leading suppliers:								
China	3,056	417	3,530	3,330	485	3,996	4,343	567
Japan	1,700	32	1,308	1,234	24	1,333	1,448	17
Germany	755	51	805	759	54	884	960	62
The Netherlands	624	41	539	508	88	718	781	60
United Kingdom	698	37	644	608	41	502	546	35
Belgium	n.a.	n.a.	280	264	34	359	390	40
USA	319	28	294	277	24	341	370	33
France	265	1,068	304	286	50	321	349	53
Spain	300	32	299	282	35	282	306	37
Italy	400	57	341	321	152	268	292	48
Switzerland	200	13	180	170	13	179	195	13
Austria	214	7	231	217	9	156	170	8
Denmark	199	14	193	182	14	151	164	13
Indonesia	104	9	158	149	10	147	160	10
Taiwan	118	15	113	107	17	132	144	19
Hong Kong	156	20	204	193	26	125	136	17
Thailand	93	12	86	82	13	80	87	13
Czech Rep.	63	10	58	55	10	65	71	14
Ireland	145	20	76	71	16	55	60	13
Malaysia	73	7	57	53	6	52	56	5

Imports of toys and games into the UNITED KINGDOM, by country of origin, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	2,079,790	1,239,472	2,020,623	1,906,248	381,097	2,290,593	2,489,775	242,462
Extra-EU	1,670,246	162,602	1,626,340	1,534,283	183,952	1,681,102	1,827,285	194,834
Developing countries	966,680	127,757	1,137,643	1,073,248	146,768	1,150,973	1,251,058	159,742
Leading suppliers:								
China	855,982	114,582	1,039,133	980,314	133,522	1,066,249	1,158,966	147,753
Japan	506,895	10,420	255,890	241,406	9,578	290,551	315,816	5,185
The Netherlands	52,529	3,208	53,624	50,589	47,210	267,124	290,352	6,535
Germany	47,115	5,977	84,458	79,677	6,379	116,783	126,938	8,277
USA	95,450	12,147	103,657	97,790	10,932	114,580	124,543	13,438
Spain	53,922	6,773	43,616	41,147	8,103	52,513	57,079	8,084
France	39,935	1,036,773	49,105	46,325	13,054	41,162	44,741	6,502
Taiwan	22,949	3,343	29,085	27,439	5,378	36,654	39,841	5,771
Italy	38,397	4,353	26,700	25,189	105,738	35,215	38,277	7,392
Hong Kong	23,136	2,223	33,183	31,305	3,344	33,817	36,758	3,935
Ireland	75,718	10,949	40,600	38,302	7,919	25,918	28,172	5,061
Thailand	25,361	3,537	24,430	23,047	3,697	23,713	25,775	3,878
Indonesia	27,385	2,659	25,434	23,994	3,012	23,166	25,180	2,444

Imports of toys and games into GERMANY, by country of origin, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	2,123,262	185,876	1,979,324	1,867,287	189,183	1,918,927	2,085,790	193,094
Extra-EU	1,556,462	130,717	1,449,834	1,367,768	136,452	1,521,338	1,653,628	140,077
Developing countries	769,602	91,483	867,174	818,089	101,056	904,876	983,561	101,089
Leading suppliers:								
China	624,845	78,891	734,311	692,746	88,471	786,867	855,290	89,493
Japan	452,747	4,645	306,756	289,392	2,992	346,395	376,516	2,151
Switzerland	81,114	4,994	67,065	63,269	4,395	77,289	84,010	5,368
The Netherlands	101,823	7,845	69,738	65,791	7,308	57,301	62,284	7,000
Austria	63,355	2,161	87,621	82,661	3,072	52,289	56,836	3,048
Czech Rep.	49,123	8,131	46,102	43,492	8,568	49,941	54,284	11,902
France	56,905	11,945	61,379	57,905	11,213	45,968	49,965	11,710
USA	83,833	5,384	65,607	61,893	4,182	45,599	49,564	2,778
Malta	40,936	2,143	40,177	37,903	2,232	44,322	48,176	2,614
Italy	89,170	13,288	72,092	68,011	11,471	41,621	45,240	8,324
United Kingdom	82,872	4,954	68,192	64,332	4,483	38,129	41,445	3,185
Portugal	5,719	414	19,201	18,114	2,442	36,840	40,043	6,992
Poland	20,437	5,337	20,975	19,788	6,671	21,203	23,047	7,341
Indonesia	30,540	2,724	29,752	28,068	2,967	19,866	21,594	2,181
Spain	20,968	2,658	16,453	15,522	2,496	17,464	18,983	2,626
Thailand	28,616	2,954	22,912	21,615	2,827	17,455	18,973	2,320

Imports of toys and games into FRANCE, by country of origin, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	1,363,655	129,814	1,392,943	1,314,097	145,194	1,601,358	1,740,606	188,351
Extra-EU	534,180	59,597	584,795	551,693	68,008	689,406	749,354	84,257
Developing countries	416,013	52,618	474,131	447,293	61,399	577,693	627,927	76,667
Leading suppliers:								
China	352,153	46,597	416,525	392,948	55,604	514,511	559,251	70,217
Germany	196,383	9,125	188,410	177,745	9,440	230,903	250,981	13,642
Belgium	n.a.	n.a.	177,881	167,812	23,697	223,451	242,882	29,241
The Netherlands	182,273	7,891	150,492	141,974	8,642	163,923	178,177	23,337
United Kingdom	80,425	5,854	68,792	64,898	5,782	99,060	107,674	8,415
Spain	75,067	8,923	73,960	69,774	10,293	67,978	73,889	11,783
Italy	80,452	12,211	80,185	75,646	13,265	58,917	64,040	11,651
Japan	46,280	506	44,611	42,086	498	34,968	38,009	329
USA	22,973	1,189	24,700	23,302	1,314	31,331	34,055	2,076
Denmark	28,127	1,839	26,356	24,864	1,530	30,105	32,723	1,670
Austria	9,420	401	17,772	16,766	460	19,285	20,962	562
Malaysia	16,771	1,286	14,788	13,951	1,188	18,170	19,750	1,452

Imports of toys and games into THE NETHERLANDS, by country of origin, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	1,256,818	93,221	1,308,209	1,234,159	90,213	1,257,779	1,367,151	99,504
Extra-EU	950,177	62,236	1,031,100	972,736	64,304	1,059,638	1,151,780	79,991
Developing countries	201,720	27,015	212,972	200,917	30,056	327,901	356,414	52,031
Leading suppliers:								
Japan	588,239	13,736	626,858	591,375	9,401	584,463	635,286	7,443
China	166,787	22,536	182,491	172,161	26,013	296,599	322,390	47,572
USA	26,772	1,792	28,477	26,865	1,760	77,642	84,394	8,842
Germany	68,415	7,059	74,177	69,978	6,459	49,050	53,315	6,118
Belgium	n.a.	n.a.	42,484	40,079	3,289	45,836	49,822	3,088
United Kingdom	74,702	5,103	70,946	66,930	6,237	42,268	45,943	2,894
Hong Kong	90,770	14,268	120,284	113,475	17,510	40,218	43,715	6,806
Italy	34,525	8,461	32,117	30,299	5,320	17,850	19,402	4,068
France	23,429	2,577	14,058	13,262	1,520	12,264	13,330	1,259
Austria	25,007	464	20,183	19,041	436	10,006	10,876	198
Indonesia	9,433	1,179	7,359	6,942	754	9,979	10,847	1,100
Taiwan	6,291	1,202	7,757	7,318	1,473	8,094	8,798	1,433
Spain	9,718	1,289	8,193	7,729	927	7,939	8,629	796
Denmark	1,623	304	5,636	5,317	442	6,649	7,227	580
Malaysia	9,728	669	9,193	8,673	660	6,121	6,653	638
Thailand	5,430	735	5,081	4,793	750	5,635	6,125	793

Imports of toys and games into SPAIN, by country of origin, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	708,753	66,593	784,241	739,850	83,149	824,096	895,757	101,477
Extra-EU	320,484	44,293	362,878	342,338	58,400	415,826	451,985	72,268
Developing countries	270,733	40,503	306,886	289,515	53,376	362,979	394,542	65,938
Leading suppliers:								
China	248,634	38,397	291,433	274,937	51,305	347,308	377,509	63,953
Germany	87,708	3,669	90,210	85,104	3,948	128,564	139,744	4,437
United Kingdom	140,599	5,883	190,523	179,739	8,206	116,032	126,122	5,889
France	26,396	3,309	25,414	23,975	3,262	58,409	63,488	7,072
Belgium	n.a.	n.a.	4,415	4,165	238	26,825	29,158	841
Italy	31,357	3,598	24,042	22,681	3,247	23,637	25,692	3,071
Austria	47,239	1,389	49,142	46,360	2,676	22,482	24,437	1,865
The Netherlands	20,220	1,340	20,129	18,990	1,388	18,912	20,557	3,448
Taiwan	8,138	1,001	9,085	8,571	1,245	15,816	17,191	2,034
USA	15,952	1,085	15,112	14,257	1,064	12,039	13,086	1,073
Hong Kong	2,342	291	8,422	7,945	1,289	10,708	11,639	2,109
Japan	16,033	413	15,106	14,251	362	6,157	6,692	220
Malaysia	7,627	619	4,897	4,620	572	4,838	5,259	538
Thailand	2,467	374	3,820	3,604	541	4,007	4,355	636

Imports of WHEELED TOYS by EU member countries, by country of origin, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	166,497	33,434	173,673	163,842	36,386	409,762	445,393	72,156
Extra-EU	56,862	14,086	61,114	57,655	15,589	274,339	298,195	47,211
Developing countries	42,578	10,189	43,583	41,116	10,923	205,927	223,834	36,151
Top 3 suppliers:								
China	40,229	9,487	40,502	38,209	10,147	201,687	219,225	34,934
Taiwan	3,463	918	6,108	5,762	1,900	49,727	54,051	7,424
Spain	30,200	4,821	32,959	31,093	5,936	31,742	34,502	5,521
Developing countries:								
Thailand	1,110	387	1,468	1,385	469	1,839	1,999	600
Indonesia	852	209	1,365	1,288	214	1,152	1,252	276
Philippines	212	45	94	89	27	447	486	131
Malaysia	19	5	0	0	0	332	361	62
Turkey	55	29	37	35	30	88	96	59
Vietnam	0	0	0	0	0	67	73	7

Imports of DOLLS by EU member countries, by country of origin, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	880,918	96,529	798,902	753,681	92,633	783,283	851,395	101,548
Extra-EU	648,705	77,286	594,138	560,508	74,011	588,751	639,947	79,461
Developing countries	607,290	73,698	556,731	525,218	70,448	559,156	607,778	75,958
Top 3 suppliers:								
China	543,284	69,028	496,421	468,322	65,717	510,154	554,515	72,355
Spain	65,165	5,666	58,463	55,154	5,757	48,518	52,737	5,692
Germany	32,203	3,231	38,422	36,247	2,701	35,664	38,765	3,278
Developing countries:								
Indonesia	18,359	1,360	18,659	17,603	1,427	25,179	27,369	1,738
Malta	11,682	405	9,275	8,750	328	9,626	10,463	311
Vietnam	5,460	607	16,055	15,146	1,593	5,667	6,160	725
Thailand	4,008	341	4,397	4,148	333	4,336	4,713	339
Philippines	1,446	152	1,391	1,312	136	897	975	77
Malaysia	17,605	1,223	6,768	6,385	480	716	778	32
Croatia	1,236	162	334	315	57	482	524	137
Tunisia	547	75	677	639	149	447	486	119
Sri Lanka	738	43	641	605	36	355	386	21
India	1,046	136	993	937	133	294	320	34
Mauritius	325	12	306	289	11	263	286	12
Kenya	0	0	0	0	0	192	209	1
Turkey	713	76	342	323	19	133	145	8

Imports of ELECTRIC TRAINS by EU member countries, by country of origin, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	112,328	5,965	122,980	116,019	6,133	109,557	119,084	6,900
Extra-EU	41,477	3,104	52,074	49,126	3,206	49,168	53,444	3,167
Developing countries	20,546	2,260	25,689	24,235	2,281	24,169	26,271	2,239
Top 3 suppliers:								
China	19,540	2,207	24,185	22,816	2,181	21,975	23,886	2,087
Germany	23,380	723	27,625	26,061	955	21,170	23,011	723
Austria	23,836	357	23,235	21,920	385	19,850	21,576	418
Developing countries:								
Slovenia	752	30	996	940	50	1,547	1,682	76
Thailand	67	15	323	305	38	425	462	63
India	1	0	63	59	6	61	66	6

Imports of MODEL ASSEMBLY KITS by EU member countries, by country of origin, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	177,729	15,513	180,267	170,063	15,823	162,750	176,902	16,306
Extra-EU	104,141	10,136	106,386	100,364	10,367	100,876	109,648	11,221
Developing countries	19,854	2,586	25,846	24,383	3,239	26,775	29,103	3,773
Top 3 suppliers:								
Germany	28,513	1,803	29,956	28,260	1,588	26,319	28,608	1,434
Japan	23,595	953	29,075	27,429	1,007	25,624	27,852	824
China	16,593	2,224	20,617	19,450	2,769	23,252	25,274	3,443
Developing countries:								
Philippines	1,264	101	1,303	1,229	96	974	1,059	49
Slovenia	357	102	566	534	96	760	826	143
Vietnam	244	24	1,225	1,156	132	654	711	70
Malaysia	194	8	59	56	12	541	588	36

Imports of CONSTRUCTION TOYS by EU member countries, by country of origin, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	687,729	58,236	639,830	603,613	54,573	532,396	578,691	47,892
Extra-EU	292,299	29,992	265,431	250,407	27,563	257,797	280,214	27,669
Developing countries	64,677	10,657	57,648	54,385	9,146	55,516	60,344	8,486
Top 3 suppliers:								
Switzerland	187,843	12,278	171,286	161,591	12,003	170,045	184,831	12,296
Denmark	142,776	8,639	144,512	136,332	8,339	94,494	102,711	5,662
China	60,134	9,744	52,261	49,303	8,302	51,465	55,940	7,740
Developing countries:								
Thailand	1,592	250	1,989	1,876	402	2,074	2,254	374
Slovenia	1,099	381	810	764	178	623	677	156
Indonesia	353	71	273	258	52	262	285	60
Malaysia	516	101	262	247	71	247	269	71

Imports of STUFFED ANIMAL TOYS by EU member countries, by country of origin, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	**volume**	**value US$**	**value €**	**volume**	**value US$**	**value €**	**volume**
Total	750,121	72,655	1,024,203	966,229	95,824	1,090,838	1,185,694	113,528
Extra-EU	604,741	61,476	841,847	794,195	81,639	878,557	954,953	93,234
Developing countries	572,294	58,458	799,883	754,607	77,953	852,419	926,542	90,880
Top 3 suppliers:								
China	418,089	46,296	684,783	646,022	68,568	751,985	817,375	82,087
Belgium	n.a.	n.a.	40,362	38,077	3,899	53,257	57,888	5,474
Indonesia	74,588	5,755	60,819	57,376	5,204	47,116	51,213	4,126
Developing countries:								
Vietnam	23,695	2,637	15,899	14,999	1,337	21,329	23,184	1,813
Sri Lanka	18,082	1,211	10,541	9,944	821	11,202	12,176	939
Thailand	20,371	1,652	14,123	13,324	1,313	10,264	11,157	1,254
Mauritius	6,093	161	5,030	4,745	136	3,740	4,065	144
Tunisia	4,394	104	3,990	3,764	108	3,079	3,347	109
Philippines	2,779	247	1,942	1,832	159	1,596	1,735	151
India	2,007	191	1,790	1,689	179	1,419	1,542	172
Slovenia	568	88	289	273	50	204	222	43

Imports of ANIMAL TOYS by EU member countries, by country of origin, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	**volume**	**value US$**	**value €**	**volume**	**value US$**	**value €**	**volume**
Total	288,366	36,588	421,251	397,407	52,043	419,610	456,098	57,415
Extra-EU	195,942	26,922	317,640	299,660	40,804	320,962	348,872	43,664
Developing countries	159,904	21,689	269,080	253,849	33,408	291,577	316,931	37,831
Top 3 suppliers:								
China	138,438	18,977	252,842	238,530	31,033	275,725	299,701	35,765
Germany	22,940	1,646	32,844	30,985	3,232	26,816	29,148	2,878
United Kingdom	20,086	1,581	14,515	13,693	1,522	13,834	15,037	2,429
Developing countries:								
Vietnam	9,881	1,224	5,147	4,856	716	3,767	4,095	494
Thailand	3,499	567	3,826	3,609	600	2,743	2,982	435
Indonesia	1,550	246	1,282	1,209	264	2,294	2,493	354
Malta	273	14	22	21	4	1,811	1,969	123
Tunisia	1,863	216	1,541	1,454	234	1,362	1,480	265
Mexico	161	21	21	20	1	1,022	1,111	75
Philippines	1,304	123	1,637	1,544	173	876	952	52

Imports of TOY MUSICAL INSTRUMENTS by EU member countries, by country of origin, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	128,937	16,154	118,864	112,136	15,204	132,456	143,974	18,214
Extra-EU	96,217	13,114	91,674	86,485	12,399	101,443	110,264	14,763
Developing countries	89,601	12,135	84,929	80,122	11,364	91,823	99,808	12,981
Top 3 suppliers:								
China	88,053	11,879	83,118	78,413	11,131	88,694	96,406	12,590
The Netherlands	6,233	452	6,591	6,218	556	11,557	12,562	1,003
Italy	12,461	1,206	7,442	7,021	814	5,365	5,832	676
Developing countries:								
Thailand	812	106	1,283	1,210	128	2,383	2,590	258
Malaysia	517	130	192	181	44	339	369	86
Sri Lanka	4	0	64	60	7	299	325	27

Imports of PUZZLES by EU member countries, by country of origin, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	135,629	27,258	109,287	103,101	25,046	102,733	111,666	27,793
Extra-EU	38,256	7,237	39,061	36,850	8,781	40,680	44,217	10,105
Developing countries	20,281	4,373	23,658	22,319	5,827	28,261	30,719	7,160
Top 3 suppliers:								
China	15,333	3,445	19,987	18,856	4,939	23,209	25,227	6,045
France	20,820	7,496	16,517	15,582	5,872	15,729	17,097	6,834
The Netherlands	14,950	3,551	14,632	13,804	3,614	12,031	13,077	3,272
Developing countries:								
Thailand	1,833	218	818	772	150	1,674	1,820	313
Indonesia	920	343	1,189	1,122	430	1,170	1,272	364
Slovenia	701	86	369	348	45	933	1,014	173
Sri Lanka	463	72	383	361	62	517	562	96
Malaysia	123	41	165	156	74	262	285	95

Imports of TOYS IN SETS by EU member countries, by country of origin, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	719,190	107,585	661,853	624,390	107,854	670,842	729,176	117,663
Extra-EU	465,445	78,202	426,528	402,385	75,534	444,527	483,182	81,234
Developing countries	425,570	71,001	387,180	365,264	68,321	405,522	440,785	73,470
Top 3 suppliers:								
China	412,051	69,213	370,123	349,173	64,790	386,146	419,724	69,903
Germany	74,902	6,889	62,703	59,154	5,948	60,772	66,056	7,394
The Netherlands	44,976	4,265	37,502	35,379	4,569	33,630	36,554	6,185
Developing countries:								
Thailand	8,033	1,006	7,661	7,227	1,222	7,469	8,118	1,269
Vietnam	45	4	3,800	3,585	878	5,950	6,467	999
Indonesia	773	109	1,727	1,629	251	2,015	2,190	329
Mexico	1,561	229	1,753	1,654	612	1,759	1,912	411
Malaysia	896	150	878	828	233	621	675	199

Imports of MOTORISED TOYS by EU member countries, by country of origin, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	387,048	50,806	397,296	374,808	52,932	412,362	448,220	55,055
Extra-EU	321,527	43,503	326,419	307,942	45,436	329,550	358,206	44,156
Developing countries	293,994	40,753	298,031	281,161	42,525	309,860	336,804	42,208
Top 3 suppliers:								
China	261,156	37,968	263,972	249,030	39,527	269,316	292,735	38,783
Malaysia	25,776	1,966	27,487	25,931	2,223	33,832	36,774	2,635
Spain	13,708	1,831	11,707	11,044	1,367	19,020	20,674	3,165
Developing countries:								
Thailand	3,117	379	4,695	4,429	453	4,269	4,640	460
Vietnam	1,187	129	913	861	156	1,035	1,125	203
Slovenia	759	55	265	250	25	431	468	44
Mexico	1,314	183	317	299	97	307	334	43
Philippines	222	22	23	22	4	296	322	9
Indonesia	233	25	130	123	25	276	300	26

Imports of MISCELLANEOUS TOYS by EU member countries, by country of origin, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	1,679,688	351,959	1,824,129	1,720,876	296,978	1,863,527	2,025,573	308,319
Extra-EU	913,358	142,439	1,102,017	1,039,639	180,039	1,194,169	1,298,010	198,511
Developing countries	720,040	107,689	905,027	853,799	142,249	1,022,759	1,111,695	163,199
Top 3 suppliers:								
China	588,018	90,216	778,263	734,210	124,978	908,835	987,864	146,919
Italy	181,834	29,246	165,089	155,744	29,092	131,997	143,475	24,828
Germany	116,434	12,683	119,958	113,168	13,027	115,533	125,579	16,196
Developing countries:								
Thailand	41,212	5,967	38,848	36,649	6,056	37,489	40,749	6,181
Malta	29,159	1,719	30,967	29,214	1,906	34,681	37,697	2,300
Mexico	13,528	2,803	13,855	13,071	3,346	8,315	9,038	2,456
Malaysia	13,768	1,697	12,094	11,409	1,535	8,145	8,853	1,271
Slovenia	8,380	734	8,851	8,350	652	6,953	7,558	659
Indonesia	4,427	996	5,467	5,158	1,209	4,078	4,433	771
Vietnam	5,949	653	4,423	4,173	671	3,043	3,308	607
Sri Lanka	2,979	321	2,494	2,353	264	3,019	3,282	394
Philippines	2,807	216	2,678	2,526	217	2,051	2,229	111
Mauritius	778	20	1,178	1,111	32	1,213	1,318	46
Madagascar	1,073	88	946	892	79	970	1,054	84
India	1,191	230	1,176	1,109	168	902	980	202
Bangladesh	227	21	14	13	1	469	510	64

Imports of VIDEO GAMES by EU member countries, by country of origin, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	2,242,809	51,666	1,957,905	1,847,080	49,288	1,816,358	1,974,302	33,464
Extra-EU	1,426,794	32,715	1,136,973	1,072,616	28,041	1,007,187	1,094,769	18,539
Developing countries	124,625	6,699	149,192	140,747	7,195	116,939	127,108	6,015
Top 3 suppliers:								
Japan	1,264,679	24,888	936,146	883,157	18,818	854,709	929,032	11,476
The Netherlands	205,734	5,280	140,136	132,204	4,544	308,678	335,520	4,287
Germany	204,864	3,480	190,803	180,003	4,040	170,229	185,031	2,219
Developing countries:								
Indonesia	0	0	65,936	62,204	969	61,879	67,260	1,243
China	113,458	6,282	78,263	73,833	6,126	53,815	58,495	4,711
Sri Lanka	0	0	27	25	5	475	516	4
Philippines	7,103	324	383	361	17	382	415	47

Imports of ARTICLES FOR BILLIARDS by EU member countries, by country of origin, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	45,375	8,242	42,295	39,901	7,950	42,428	46,117	9,623
Extra-EU	22,316	3,989	21,468	20,253	4,443	26,020	28,283	6,430
Developing countries	7,161	1,508	7,763	7,324	2,071	14,368	15,617	4,382
Top 3 suppliers:								
China	6,078	1,201	7,004	6,608	1,840	13,441	14,610	4,100
Taiwan	5,344	969	6,514	6,145	1,083	5,227	5,681	1,015
United Kingdom	4,564	687	4,208	3,970	764	3,606	3,920	731
Developing countries:								
Indonesia	763	195	466	440	142	564	613	179
Turkey	165	70	75	71	34	158	172	56
Slovenia	0	0	0	0	0	67	73	11

Imports of GAMES OPERATED BY COINS by EU member countries, by country of origin, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	812,773	35,620	717,038	676,451	39,744	525,774	571,494	30,382
Extra-EU	368,424	17,656	295,362	278,643	17,709	212,632	231,122	14,572
Developing countries	30,190	2,790	37,493	35,371	4,131	37,312	40,556	3,962
Top 3 suppliers:								
United Kingdom	170,713	6,296	140,385	132,439	6,567	130,268	141,596	6,483
USA	131,649	5,102	112,540	106,170	4,589	76,946	83,637	2,942
Japan	141,930	3,193	87,361	82,416	2,513	50,831	55,251	1,365
Developing countries:								
China	27,219	2,407	34,033	32,107	3,666	32,307	35,116	3,479
Slovenia	404	18	324	306	35	2,804	3,048	132
Thailand	507	81	561	529	101	512	557	92
Croatia	176	59	377	356	116	414	450	113
Indonesia	50	10	42	40	3	268	291	40
South Africa	728	133	1,129	1,065	52	201	219	9

Imports of PLAYING CARDS by EU member countries, by country of origin, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	57,524	6,873	58,382	55,077	8,433	267,153	290,384	39,547
Extra-EU	14,142	2,008	19,894	18,768	2,879	113,630	123,511	14,803
Developing countries	3,181	935	3,864	3,645	1,274	5,878	6,389	1,573
Top 3 suppliers:								
USA	7,091	524	10,547	9,950	977	102,069	110,945	12,728
The Netherlands	8,416	540	11,297	10,658	1,673	99,305	107,940	18,779
Belgium	n.a.	n.a.	13,054	12,315	2,076	32,221	35,023	3,008
Developing countries:								
China	2,612	771	3,196	3,015	1,055	5,248	5,704	1,364
India	299	93	379	358	132	356	387	150
Thailand	118	36	58	55	24	113	123	27

Imports of OTHER GAMES by EU member countries, by country of origin, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	1,111,746	1,020,853	1,062,997	1,002,827	240,030	1,380,569	1,500,618	106,058
Extra-EU	705,438	59,256	688,437	649,469	59,311	881,634	958,298	61,644
Developing countries	329,495	39,663	338,186	319,043	41,889	396,585	431,071	44,426
Top 3 suppliers:								
Japan	256,095	2,420	236,587	223,195	1,748	379,682	412,698	2,624
China	305,316	35,539	320,290	302,160	38,191	378,358	411,259	40,329
Germany	79,258	4,058	111,859	105,527	6,407	250,057	271,801	8,299
Developing countries:								
Malaysia	8,122	1,194	5,139	4,848	727	6,013	6,536	765
Thailand	6,498	1,396	6,158	5,809	1,359	4,494	4,885	971
India	1,505	232	1,413	1,333	223	2,266	2,463	433
Slovenia	2,993	657	1,320	1,245	335	2,166	2,354	596
Kenya	94	21	302	285	272	995	1,082	900
Indonesia	1,272	162	898	847	252	704	765	194
Pakistan	395	66	457	431	88	284	309	57

EXPORTS

Exports of toys and games by EU member countries, by country of origin, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	5,451,593	1,277,635	5,229,643	4,933,625	545,439	5,032,471	5,470,077	498,001
Extra-EU	1,301,437	113,414	1,277,833	1,205,503	109,919	1,300,599	1,413,695	127,411
Leading destinations:								
France	856,204	77,846	695,618	656,243	76,018	783,092	851,187	85,045
Germany	713,241	70,449	659,551	622,218	70,208	554,283	602,482	62,890
United Kingdom	436,930	45,517	417,769	394,122	44,870	400,774	435,624	44,101
The Netherlands	336,894	30,663	327,804	309,249	32,616	339,863	369,416	37,745
Spain	327,980	20,502	341,084	321,777	22,387	331,444	360,265	22,329
USA	322,792	21,141	324,240	305,887	22,439	312,350	339,511	28,321
Belgium	n.a.	n.a.	361,176	340,732	33,596	309,364	336,265	30,073
Italy	294,965	818,547	284,174	268,089	78,269	240,689	261,619	18,710
Austria	187,285	13,691	206,531	194,841	14,550	159,512	173,383	13,642
Portugal	136,754	12,052	162,585	153,382	13,698	146,569	159,314	13,471
Switzerland	149,090	9,799	144,556	136,374	10,346	139,357	151,475	10,023
Ireland	134,957	12,961	139,311	131,425	20,621	139,020	151,109	13,673
Sweden	104,966	9,186	98,466	92,892	7,933	100,721	109,479	10,113
Norway	69,484	5,565	81,194	76,598	5,713	77,481	84,218	6,754
Denmark	91,832	7,190	87,313	82,371	7,199	75,146	81,680	6,864
Greece	89,369	6,361	81,153	76,559	5,842	71,147	77,334	5,945
Hungary	61,951	6,077	66,108	62,366	7,321	62,326	67,746	9,756
Japan	44,414	2,034	44,364	41,853	1,961	56,897	61,845	2,858
Czech Rep.	41,681	4,583	55,200	52,075	5,231	53,872	58,557	5,315

APPENDIX 2 STANDARDS ORGANISATIONS

INTERNATIONAL
Internationalisation Standardisation Institute (ISO)
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Telefax: + 41 (0) 22 733 3430
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EUROPEAN UNION
Comité Européen de Normalisation (CEN)
European Normalisation Committee
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B-1050 Brussels, Belgium
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RAL, Deutsches Institut für Gütesicherung & Kennzeichnung
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Internet: www.nni.nl

SPAIN
Instituto Español Normalization y Certificacion (AENOR)
Address: Genova 6, 28004 Madrid, Spain
Telephone: + 34 (0) 91 432 6000
Telefax: + 34 (0) 91 310 4032
E-mail: info@aenor.es
Internet: www.aenor.es

UNITED KINGDOM
British Standards Institution (BSI)
Address: 389 Chiswick High Road,
London W4 4AL, United Kingdom
Telephone: + 44 (0) 20 8996 9000
Telefax: + 44 (0) 20 8996 7400
E-mail: info@bsi-global.com
Internet: www.bsi-global.com

APPENDIX 3 SOURCES OF PRICE INFORMATION

GERMANY
Das Spielzeug

Address:	Meisenbach GmbH, P.O. Box 2069, 96011 Bamberg, Germany
Telephone:	+ 49 (0) 951 861 113
Telefax:	+ 49 (0) 951 861 149
E-mail:	spielzeug@meisenbach.de
Internet:	www.meisenbach.de

THE NETHERLANDS
Speelgoed + Hobby

Address:	Gebra, Ierlandlaan 2, 2713 HL Zoetermeer, The Netherlands
Telephone:	+ 31 (0) 79 351 4321
Telefax:	+ 31 (0) 79 320 0635
E-mail:	info@gebra.nl
Internet:	www.gebra.nl

UNITED KINGDOM
Toy Trader / Toy Trader Bulletin

Address:	Lema publishing Co. Ltd, Unit 1, Queen Mary's Avenue, Watford, Herst WD1 7JR, United Kingdom
Telephone:	+ 44 (0) 1923 250 909
Telefax:	+ 44 (0) 1923 250 993
E-mail:	karen@lemapublishing.co.uk
Internet:	www.toy.co.uk/toytrader/

APPENDIX 4 TRADE ASSOCIATIONS

INTERNATIONAL
International Council of Toy Industry

Address: 80 Camperwell Road, London, SE5 0EG, UK
Telephone: + 44 (0) 207 701 7271
Telefax: + 44 (0) 207 708 2437
E-mail: info@icti-toy.org
Internet: www.toy-icti.org/index.htm

EUROPEAN UNION
TIE (Toy Industries Europe)
With members all over Europe

Address: Avenue des Arts 58, 1000 Brussels , Belgium
Telephone: + 32 (0) 2 732 70 40
Telefax: + 32 (0) 2 736 90 68
E-mail: tie@tietoy.org
Internet: www.tietoy.org

TIE members:

Germany: Deutscher Verband der Spielwaren Industrie
Address: Guntherstraße 45 b,
90461 Nürnberg, Germany
Telephone: + 49 (0) 911 94 96 80
Telefax: + 49 (0) 911 94 96 880
E-mail: info@toy.de
Internet: www.toy.de

Italy: Assogiocattoli
Address: Foro Bonaparte 65, 2012 Milan, Italy
Telephone: + 39 02 80604330
Telefax: + 39 02 80604392
E-mail: assogiocattoli@federlegno.it
Internet: www.federlegno.it/associazioni/assogiocattoli/default.asp

Spain: Associacion Espanola de Fabricantes de Juguetes
Address: Marqués de Urquijo, 6-8, 28008 Madrid, Spain
Telephone: + 34 (0)915 411305
Telefax: + 34 (0)915 413543
E-mail: aefj@aefj.es
Internet: www.aefj.es

Please consult the website www.tietoy.org for more national toy associations.

FRANCE
Fédération Française Des Industries Jouet Puériculture

Address: 103, rue La Fayette, 75010 Paris, France
Telephone: + 33 (0) 1 40162570
Telefax: + 33 (0) 1 40162571
Internet: www.fjp.fr

Maison de Jeux
An association specialised in traditional toys from all over the world

Address: 9, rue de la Poste, 38000 Grenoble, France
Telephone: + 33 (0) 4 76 43 28 36
Telefax: + 33 (0) 4 76 43 28 36
E-mail: mdj.grenoble@wanadoo.fr

NETHERLANDS
Vereniging GEBRA
Association for retailers

Address: P.O. Box 7105,
2701 AC Zoetermeer, The Netherlands
Telephone: + 31 (0) 79 351 4321
Telefax: + 31 (0) 79 320 0635
E-mail: info@gebra.nl
Internet: www.gebra.nl

Stichting Speelgoed Nederland (SGN)

Address: P.O. Box 96070,
1006 EB Amsterdam, The Netherlands
Telephone: + 31 (0) 20 610 0820
Telefax: + 31 (0) 20 619 2215
E-mail: burovanrijn@wxs.nl

UNITED KINGDOM
British Toy & Hobby Association

Address: 80 Camberwell Road,
London SE5 0EG, United Kingdom
Telephone: + 44 (0) 20 7701 7271
Telefax: + 44 (0) 20 7708 2437
E-mail: admin@btha.co.uk
Internet: www.btha.co.uk

APPENDIX 5 TRADE FAIR ORGANISERS

FRANCE

SIJ, Univers d' Enfants 2002

Address:	Salon International du Jouet, 103, Rue Lafayette, 75481 Paris Cedex 10, France
Telephone:	+ 33 (0) 1 40160015
Telefax:	+ 33 (0) 1 40160358
E-mail:	info@univers-enfants.com
Internet:	www.univers-enfants.com

GERMANY

Nuremburg Toy Fair

Address:	Spielwarenmesse EG, Münchenerstraße 330, 90471 Nuremberg, Germany
Telephone:	+ 49 (0) 911 998 130
Telefax:	+ 49 (0) 911 869 660
E-mail:	info@spielwarenmesse.de
Internet:	www.spielwarenmesse.de

ITALY

Salon Internazionale del Giocattolo

Address:	Via Petitti 16, 20149 Milan, Italy
Telephone:	+ 39 02 4855 0312
Telefax:	+ 39 02 3300 1415
E-mail:	giocattolo@fmi.it
Internet:	http://giocattolo.fmi.it

THE NETHERLANDS

Trade mart toys and games

Address:	Jaarsbeurs Utrecht, P.O. Box 8500, 3503 RM Utrecht, The Netherlands
Telephone:	+ 31 (0)30 2955 524
Telefax:	+ 31 (0)30 2955 539
E-mail:	info@jaarbeursutrecht.nl
Internet:	www.jaarbeursutrecht.nl

SPAIN

FEJU / International Toy Fair

Address:	Feria Muestrario Internacional de Valencia, 46080 Valencia, P.O. Box 476, Spain
Telephone:	+ 34 (0)3496 3861 100
Telefax:	+ 34 (0)3496 3861 300
E-mail:	FEJU@valencia.com
Internet:	www.feriavalencia.com

UNITED KINGDOM

British Toy Fair

Address:	80 Camberwell Road, SE5 0EG London, United Kingdom
Telephone:	+ 44 (0) 20 77017127
Telefax:	+ 44 (0) 20 72525925
E-mail:	toyfair@btha.co.uk
Internet:	www.britishtoyfair.co.uk

APPENDIX 6 TRADE PRESS

BELGIUM

Toy & Baby Business

Address: Rue de Bau 2, 1450 Chastre, Belgium
Telephone: + 32 (0) 10 650 387
Telefax: + 32 (0) 10 655 345
Internet: www.dree.org/belgique/fiches/pi/jouet.htm

FRANCE

La Revue du Jouet

Address: 96, boulevard Richard Lenoir, 75011 Paris, France
Telephone: + 33 (0) 1 5528 1700
Telefax: + 33 (0) 1 5528 1717
Internet: www.cepp.fr
E-mail: cepp@wanadoo.fr

GERMANY

Das Spielzeug

Address: Meisenbach GmbH, P.O. Box 2069, 96011 Bamberg, Germany
Telephone: + 49 (0) 951 861 113
Telefax: + 49 (0) 951 86 149
E-mail: spielzeug@meisenbach.de
Internet: www.meisenbach.de

Toys

Address: Gröller Verlag GmbH, Aschmattstr. 8, 76532 Baden-Baden, Germany
Telephone: + 49 (0) 7221 502 200
Telefax: + 49 (0) 7221 502 222
E-mail: diestla@groeller.de

ITALY

Giochi & Giocattoli

Address: Via Giulio Uberti 37, I-20129 Milano, Italy
Telephone: + 39 2205681
Telefax: + 39 220568600
E-mail: mario.vespucci@sferagroup.it

SPAIN

Juguetes y Juegos de España

Address: Maria Dolores Just, Calle San Germán 5-1a, 08004 Barcelona, Spain
Telephone: + 34 (0)93 3253287
Telefax: + 34 (0)93 4244460
E-mail: ejust@app.es/ mdjust@aefj.es
Internet: www.juguetesyjuegos.com

SWEDEN

Svensk Leksaks Revy

Address: Kungsgatan 19, S-10561 Stockolm, Sweden
Telephone: + 46 (0) 8 5064 7251
Telefax: + 46 (0) 8 5064 7259
E-mail: per.sparre@leksakshandlarna.se

THE NETHERLANDS

Speelgoed + Hobby

Address: Vakblad Speelgoed+Hobby, P.O. Box 7105, 2701 AC Zoetermeer, The Netherlands
Telephone: + 31 (0) 79 321 9251
Telefax: + 31 (0) 79 320 0635
E-mail: stiva@gebra.nl

UNITED KINGDOM

Briefing

Address: 80 Camberwell Road, UK-London, SE5 OEG, United Kingdom
Telephone: + 44 (0) 171 7017127
Telefax: + 44 (0) 171 7082437
E-mail: david@btha.co.uk

Toy Trader / Toy Trader Bulletin

Address: Peebles Publishing Group Ltd Brookmead House, 8 Thorney Leys, Business Park, Witney Oxon, OX8 7GE, United Kingdom
Telephone: + 44 (0) 1993 775545
Telefax: + 44 (0) 1993 778884
Internet: www.toy.co.uk/toytrader/

Toys 'n Playthings

Address: Lema Publishing Co. Ltd, Unit 1, Queen Mary's Avenue, Watford, Herts. WDI18 7JR, United Kingdom
Telephone: + 44 (0) 1923 250909
Telefax: + 44 (0) 1923250995
Internet: www.toysnplaythings.com
E-mail: john@lemapublishing.co.uk

International Directory of Toy Buyers

Address: Gameplan Europe Ltd., 6 Kitsbury Court, Kitsbury Terrace, Berkhamsted, Herts HP4 3EL, United Kingdom
Telephone: + 44 (0) 1442 870100
Telefax: + 44 (0) 1442 878400
E-mail: enquiries@gameplaneurope.com
Internet: www.gameplaneurope.com

World Toy News

Address: Toy News Network Ltd, 113 High Street, Berkhamstead, Herts HP4 2DJ, United Kingdom
Telephone: + 44 (0) 1442 862864
Telefax: + 44 (0) 1442 863049
E-mail: publisher.tnn@virgin.net

APPENDIX 7 BUSINESS SUPPORT ORGANISATIONS

INTERNATIONAL
International Trade Centre UNCTAD/WTO (ITC)
Address: Palais des Nations, P.O. Box 10,
1211 Geneva 10, Switzerland
Telephone: + 41 (0) 22 7300111
Telefax: + 41 (0) 22 7334439
E-mail: itcreg@intracen.org
Internet: www.intracen.org

EUROPEAN UNION
Joint Ventures/ Partnerships

Al-Invest
Promotion of business co-operation between companies in the European Union and Latin America
Address: 75 avenue de Tyras, B-1120 Brussels, Belgium
Telephone: + 32 (0) 2 2664900
Telefax: + 32 (0) 2 2664901
E-mail: info@al-invest.net
Internet: www.al-invest.org

Asia-Invest
Promotion of business co-operation between companies in the European Union and Asia
Address: Archimedesstraat 17,
B-1000 Brussels, Belgium
Telephone: + 32 (0) 2 2821750
Telefax: + 32 (0) 2 2821760
E-mail: asia.invest@asia-invest.com
Internet: www.asia-invest.com

Centre for Industrial Development (CDI)
Promotion of partnerships between ACP and European companies
Address: 52 avenue Hermann Debroux,
B-1160 Brussels, Belgium
Telephone: + 32 (0) 2 6791811
Telefax: + 32 (0) 2 6752603
E-mail: director@cdi.be
Internet: www.cdi.be

AUSTRIA
Austrian Federal Economic Chamber
Address: P.O. Box 150, A-1045 Vienna, Austria
Telephone: + 43 (0) 1 50104194
Fax: + 43 (0) 1 50105
E-mail: awo.ebiz-online@wko.at
Internet: www.wk.or.at

DENMARK
DIPO, Danish Import Promotion Office for Products from Developing Countries
Address: Danish Chamber of Commerce, Børsen,
1217 Copenhagen K, Denmark
Telephone: + 45 (0) 33 950500
Telefax: + 45 (0) 33 120525
E-mail: dipo@commerce.dk
Internet: www.dipo.dk

Germany
BfAI, Federal Office of Foreign Trade Information
Address: Agrippastrasse 87-93, P. O. Box 100522,
50455 Cologne, Germany
Telephone: + 49 (0) 221 2057-0
Telefax: + 49 (0) 221 2057-212
E-mail: info@bfai.com
Internet: www.bfai.com

ITALY
ICE
Italian National Institute for Foreign Trade
Address: Via Liszt 21, 00144 Rome, Italy
Telephone: + 39 06 59921
Telefax: + 39 0659926900
E-mail: ice@ice.it
Internet: www.ice.it

THE NETHERLANDS
CBI, Centre for the Promotion of Imports from developing countries
Address: P.O. Box 30009,
3001 DA Rotterdam, The Netherlands
Telephone: + 31 (0) 10 2013434
Telefax: + 31 (0) 10 4114081
E-mail: cbi@cbi.nl
Internet: www.cbi.nl

NORWAY
Norad, Norwegian Agency for Development Co-operation
Address: Tolbugaten 31, P.O. Box 8034 Deo,
Oslo, Norway
Telephone: + 47 (0) 22 314400
Telefax: + 47 (0) 22 314401
E-mail: postmottak@oslo.norad.no
Internet: www.norad.no

SPAIN
Chamber of Commerce, Barcelona
Address: Av. Diagonal, 452 08006 - Barcelona, Spain
Telephone: + 34 902 448 448
Telefax: + 34 934 169 301
Internet: www.cambrabcn.es

SWEDEN
SIDA, Swedish International Development Co-operation Agency - Department for Infrastructure & Economic Co-operation
Address: Sveavägen 20, S-105 25 Stockholm, Sweden
Telephone: + 46 (0) 8 6985000
Telefax: + 46 (0) 8 6208864
E-mail: sida@sida.org.se
Internet: www.sida.se

SWITZERLAND
SIPPO, Swiss Import Promotion Programme
Address: P.O. Box 492, CH-8035 Zurich, Switzerland
Telephone: + 41 (0) 1 3655200
Fax: + 41 (0) 1 3655202
E-mail: info@sippo.ch
Internet: www.sippo.ch

APPENDIX 8 OTHER USEFUL ADDRESSES

BELGIUM
Association of European Chambers of Commerce and Industry
Address: Rue Archimède 5, P.O. Box 4,
1000 Brussels, Belgium
Telephone: + 32 (0) 2 2820850
Fax: + 32 (0) 2 2300038
E-mail: eurochambres@eurochambres.be
Internet: www.eurochambres.be

Commission of the European Communities DG XI - A - 2
Address: Rue de la Loi 200, 1049 Brussels, Belgium
Telephone: + 32 (0) 2 295 7755
Telefax: + 32 (0) 2 295 5684
E-mail: ecolabel@dg11.cec.be

GERMANY
Federal Statistical Office
Address: Gustav-Stresemann-Ring 11,
D-65189 Wiesbaden, Germany
Telephone: + 49 (0) 611 752 405
Telefax: + 49 (0) 611 753 330
E-mail: info@statistik-bund.de
Internet: www.statistik-bund.de/e_home.htm

THE NETHERLANDS
Central Statistics Bureau (CBS)
Address: P.O. Box 4000,
2270 JM Voorburg, The Netherlands
Telephone: + 31 (0) 70 337 3800
Telefax: + 31 (0) 70 387 7429
E-mail: infoserve@cbs.nl
Internet: www.cbs.nl

CBI/AccessGuide
Address: P.O. Box 30009,
3001 DA Rotterdam, The Netherlands
Telephone: + 31 (0) 10 201 3434
Telefax: + 31 (0) 10 411 4081
E-mail: cbi@cbi.nl
Internet: www.cbi.nl/accesguide

Centrale dienst voor In- en Uitvoer
Central Service for Imports and Exports
Address: P.O. Box 3003,
9700 RD Groningen, The Netherlands
Telephone: + 31 (0) 50 523 9111
Telefax: + 31 (0) 50 526 0698

Stichting Milieukeur (Milieukeur Foundation)
The Netherlands Competent Body for the EU Ecolabel and for the Milieukeur Label
Address: Eisenhowerlaan 150, P.O. Box 17186,
2502 CD The Hague, The Netherlands
Telephone: + 31 (0) 70 3586300
Fax: + 31 (0) 70 3502517
E-mail: milieukeur@milieukeur.nl
Internet: www.milieukeur.nl

Chamber of Commerce
Association of Chambers of Commerce in The Netherlands
Address: P.O. Box 265,
3440 AB Woerden, The Netherlands
Telephone: + 31 (0) 348 426 911
Telefax: + 31 (0) 348 424 184
E-mail: site@vvk.kvk.nl
Internet: www.kvk.nl

Economische Voorlichtingsdienst (EVD)
Netherlands Foreign Trade Agency
Address: Bezuidenhoutseweg 181, P.O. Box 20105,
2500 EC The Hague, The Netherlands
Telephone: + 31 (0) 70 379 8933
Telefax: + 31 (0) 70 379 7878
E-mail: evdvp@euronet.nl
Internet: www.evd.nl

Keuringsdienst van Waren
Health and Safety Standards Inspectorate for Health Protection
Address: P.O. Box 5406,
2280 HK Rijswijk, The Netherlands
Telephone: + 31 (0) 70 340 7911
Telefax: + 31 (0) 70 340 7834

Organisatie van Nederlandse Speelgoed Leveranciers
(ORNES, toy suppliers)
Address: P.O. Box 96070,
1006 EB Amsterdam, The Netherlands
Telephone: + 31 (0) 20 6100 820
Telefax: + 31 (0) 20 6192 215

SDU Service Centre
Address: P.O. Box 20014,
2500 EA The Hague, The Netherlands
Telephone: + 31 (0) 70 378 9880
Telefax: + 31 (0) 70 378 9783
E-mail: info@sdu.nl
Internet: www.sdu.nl

Vereniging van Speelgoedfabrikanten in de Benelux
(Association of Benelux Toy Manufacturer)

Address:	P.O. Box 1729, 1000 BS Amsterdam, The Netherlands
Telephone:	+ 31 (0) 20 626 7141
Telefax:	+ 31 (0) 20 623 4482

SWEDEN
Association of Swedish Suppliers of Toys and Hobby Articles

Address:	S-103 29 Stockholm, Sweden
Telephone:	+ 46 (0) 8 678 80 01
Telefax:	+ 46 (0) 8 679 9665
E-Mail:	johan.leffler@sht.se

APPENDIX 9 LIST OF DEVELOPING COUNTRIES

The list of developing countries as applied in this market survey, is the OECD DAC list of countries receiving Official Development Assistance (Part I). The list used is the one as at 1/1/2000.

Afghanistan
Albania
Algeria
Angola
Anguilla
Antigua and Barbuda
Argentina
Armenia
Azerbaijan
Bahrain
Bangladesh
Barbados
Belize
Benin
Bhutan
Bolivia
Bosnia & Herzegovina
Botswana
Brazil
Burkina Faso
Burundi
Cambodia
Cameroon
Cape Verde
Central African rep.
Chad
Chile
China
Colombia
Comoros
Congo, Dem. Rep
Congo, Rep.
Cook Islands
Costa Rica
Côte d'Ivoire
Croatia
Cuba
Djibouti
Dominica
Dominican republic
Ecuador
Egypt
El Salvador
Equatorial Guinea
Eritrea
Ethiopia
Fiji
Gabon
Gambia
Georgia
Ghana
Grenada
Guatemala
Guinea
Guinea-Bissau
Guyana
Haiti
Honduras
India
Indonesia
Iran
Iraq
Jamaica
Jordan
Kazakstan
Kenya
Kiribati
Korea, Rep. of
Kyrghyz Rep.
Laos
Lebanon
Lesotho
Liberia
Macedonia
Madagascar
Malawi
Malaysia
Maldives
Mali
Malta
Marshall Islands
Mauritania
Mauritius
Mayotte
Mexico
Micronesia, Fed. States
Moldova
Mongolia
Montserrat
Morocco
Mozambique
Myanmar
Namibia
Nauru
Nepal
Nicaragua
Niger
Nigeria
Niue
Oman
Pakistan
Palau Islands
Palestinian Admin. Areas
Panama
Papua New Guinea
Paraguay
Peru
Philippines
Rwanda
São Tomé & Principe
Saudi Arabia
Senegal
Seychelles
Sierra Leone
Slovenia
Solomon Islands
Somalia
South Africa
Sri Lanka
St. Helena
St. Kitts-Nevis
St. Lucia
St. Vincent and Grenadines
Sudan
Surinam
Swaziland
Syria
Tajikistan
Tanzania
Thailand
Timor
Togo
Tokelau
Tonga
Trinidad & Tobago
Tunisia
Turkey
Turkmenistan
Turks & Caicos Islands
Tuvalu
Uganda
Uruguay
Uzbekistan
Vanuatu
Venezuela
Vietnam
Wallis & Futuna
Western Samoa
Yemen
Yugoslavia, Fed. Rep.
Zambia
Zimbabwe

Note: Eurostat figures do not include figures for Cook Islands, Niue, St. Kitts-Nevis, Timor and Tokelau

APPENDIX 10 LIST OF EU IMPORTERS

THE NETHERLANDS

Broem Spel en Speel BV
Specialises in wooden toys and games, like various wooden carts, dolls' bed, complete series of little boats and cars
Address: Nieuwendijk 42-A,
5591 JK Heeze, The Netherlands
Telephone: + 31 (0) 40 2265756
Telefax: + 31 (0)40 2265766

Canenco BV
Importer of soft toys, girls' toys, boys' toys and other toys
Address: PO Box 476,
2400 AL Alphen aan den Rijn,
The Netherlands
Telephone: + 31 (0) 172 427171
Telefax: + 31 (0) 172 438345
E-mail: toys@canenco.nl
Internet: www.canenco.nl

Edor Benelux BV
Importer of pre-school toys, girls' toys, boys' toys, and other toys and distributor in Western Europe
Address: Larserpoortweg 4,
8218 NK Lelystad, The Netherlands
Telephone: + 31 (0) 320 246767
Telefax: + 31 (0) 320 240821
E-mail: web@edor.nl
Internet: www.edocar.nl

Engelhart Handelsonderneming
Importer and (online) seller to stores and consumers (via catalogue) of a wide array of specialised games and wooden toys
Address: P.O. Box 4059,
5004 JB Tilburg, The Netherlands
Telephone: + 31 (0) 13 5445789
Telefax: + 31 (0) 13 5445669
E-mail: info@engelhart.nl
Internet: www.engelhart.nl

Frits de Vries Agenturen BV
One of the 17 distributors of BRIO articles worldwide. See also www.brio.se/toy/address2.html
Importer of wooden toys and other toys
Address: P.O.Box 1614,
3600 BE Maarssen, The Netherlands
Telephone: + 31 (0) 30 2414000
Telefax: + 31 (0) 30 2414616
E-mail: frits.de.vries.agenturen@euronet.nl

Gebr. Simon
Importer of pre-school toys, wooden toys, soft toys, girls' toys, boys' toys, board games and puzzles, and other toys
Address: George Steffensonstraat 20,
8013 MK Zwolle, The Netherlands
Telephone: + 31 (0) 38 4600015
Telefax: + 31 (0) 38 4600016

Gebro BV
Pre-school toys, wooden toys, girls'toys, boys'toys, board games and puzzles
Address: P.O. Box 79, 8250 AB Dronten,
Telephone: + 31 (0) 321 314984
Telefax: + 31 (0) 321 317095

Goliath BV
Importer of board games and puzzles
Address: Vijzelpad 80, 8051 KR, P.O. Box 51,
8050 AB Hattem, The Netherlands
Telephone: + 31 (0) 38 4443093
Telefax: + 31 (0) 38 4446109
E-mail: info@goliathgames.nl.
Internet: www.goliathgames.nl

Harlekijn Import BV
Importer of pre-school toys, wooden toys and other toys. Distributor in Europe. Member of the society ' The Genuine Toy'.
Address: Cornelis Verolmeweg 7,
2171 KV Sassenheim, The Netherlands
Telephone: + 31 252 229125
Telefax: + 31 252 233497
E-mail: info@harlekijnimportbv.nl

Harry Simons Agencies BV
Importer of pre-school toys, wooden toys, soft toys, girls' toys, boys' toys, and other toys
Address: P.O. Box 8835,
1006 JA Amsterdam, The Netherlands
Telephone: + 31 (0) 20 4804500
Telefax: + 31 (0) 20 4804580
E-mail: info@harrysimons.nl

Impag Toys Europe BV
Importer of pre-school toys, soft toys, girls' toys, boys' toys, and other toys
Address: Kartonbaan 5,
9672 BP Winschoten, The Netherlands
Telephone: + 31 (0) 597 451050
Telefax: + 31 (0) 597 451060
E-mail: info@impag.com

International Bon Ton Toys BV
Importer of pre-school toys, soft toys and girls' toys
Address: P.O. Box 1035,
2300 BB Leiden, The Netherlands
Telephone: + 31 (0) 71 5811010
Telefax: + 31 (0) 71 5897924
E-mail: anna-club-pluche@ibtt.nl

Kempenaar Import-Export BV
Importer of pre-school toys, wooden toys, soft toys, girls' toys, boys toys, and other toys
Address: P. O. Box 3106,
7339 ZG Apeldoorn, The Netherlands
Telephone: + 31 (0) 55 5332360
Telefax: + 31 (0) 55 5331354
E-mail: info@kempenaar.nl

Kiba Agenturen BV
Importer of boys' toys, trains, models, hobby articles, and other toys
Address: Amsbergstraat 4,
7418 EZ Deventer, The Netherlands
Telephone: + 31 (0) 570 635457
Telefax: + 31 (0) 570 624343

Mertex Trading
Importer of wooden toys and constructions, and other toys
Address: P.O. Box 4675,
4803 ER Breda, The Netherlands
Telephone: + 31 (0) 76 5601941
Telefax: + 31 (0) 76 5601951
Internet: www.mertrex.nl
E-mail: office@mertex.nl

Miremi Agenturen
Importer of pre-school toys, and other toys
Address: P.O. Box 28,
1474 ZG Oosthuizen, The Netherlands
Telephone: + 31 (0) 299 401995
Telefax: + 31 (0) 299 401995

Ostoy Trading BV
Importer of both toys and gifts and the like in bulk
Address: Keurmeesterstraat 18,
2984 BA Ridderkerk, The Netherlands
Telephone: + 31 (0) 180 411222
Telefax: + 31 (0) 180 463336
E-mail: o.stoy@inter.nl.net

Overbeek Import BV
Importer of trains, models and hobby articles
Address: Fultonstraat 11-15,
3133 KH Vlaardingen, The Netherlands
Telephone: + 31 (0) 10 4351836
Telefax: + 31 (0) 10 4600198

PSK Modelbouw
Importer of train models, hobby articles
Address: Zijlweg 277,
2015 CM Haarlem, The Netherlands
Telephone: + 31 (0) 23 5277291
Telefax: + 31 (0) 23 5277624

Pyro BV
Importer of boys' toys and other toys
Address: P.O. Box 93,
6970 AB Brummen, The Netherlands
Telephone: + 31 (0) 575 564266
Telefax: + 31 (0) 575 563027
E-mail: pyro.brummen@wxs.nl

Reyne & Zonen BV
Importer of trains, models and hobby articles
Address: P.O. Box 7,
1560 AA Krommenie, The Netherlands
Telephone: + 31 (0) 75 6283154
Telefax: + 31 (0) 75 6281558
Internet: www.tamiya.nl

Schnitzler BV
Importer of soft toys
Address: Stationsweg 27,
2312 AT Leiden, The Netherlands
Telephone: + 31 (0) 71 5144942
Telefax: + 31 (0) 71 5142648
E-mail: happy-horse@wxs.nl

Selecta Spel en Hobby BV
Importer of board games and puzzles
Address: Wattstraat 2, 3771 AG Barneveld,
The Netherlands
Telephone: + 31 (0) 342 416406
Telefax: + 31 (0) 342 692725

Speel Goed BV
Importer of wooden toys and other toys
Address: P.O. Box 2733,
1000 CS Amsterdam, The Netherlands
Telephone: + 31 (0) 20 6612169
Telefax: + 31 (0) 20 6446374
E-mail: speel-goed@compuserve.com

Tiamo BV
Importer of pre-school toys, soft toys, boys' toys and other toys
Address: P.O. Box 450,
8200 AL Lelystad, The Netherlands
Telephone: + 31 (0) 320 242644
Telefax: + 31 (0) 320 234030
E-mail: tiamo@wxs.nl
Contactperson: Mr. J.F. Wagendrever

Toi Toys
Importer of soft toys, girls' toys, boys' toys and other toys
Address: P.O. Box 360,
5500 AJ Veldhoven, The Netherlands
Telephone: + 31 (0) 40 2543610
Telefax: + 31 (0) 40 2547189
E-mail: info@toi-toys.com

Twisk Groothandel BV
Importer of girls' toys, boys' toys and other toys, stationery also
Address: Bovendijk 213-214,
3045 PD Rotterdam, The Netherlands
Telephone: + 31 (0) 10 4222685
Telefax: + 31 (0) 10 4222019
Contactperson: Mr. R.M. Twisk

Van der Meulen Sneek BV
Importer of toys
Address: P.O. Box 80, 8600 AB Sneek, The Netherlands
Telephone: + 31 (0) 515 418315
Telefax: + 31 (0) 515 420247
E-mail: meulens@euronet.nl
Contacperson: Mr. R. de Graaf

Van Manen BV
Importer of pre-school toys, soft toys and other toys
Address: Wageningselaan 8, P.O. Box 61,
3900 AB Veenendaal, The Netherlands
Telephone: + 31 (0) 318 549150
Telefax: + 31 (0) 318 528950

Veenborg BV
Importer of other toys
Address: P.O. Box 58,
7060 AB Terborg, The Netherlands
Telephone: + 31 (0) 315 328727
Telefax: + 31 (0) 315 326449

Woody Express
(Small) wholesaler of wooden toys and gift articles
Address: Beltrumsestraat 10,
7141 AL Groenlo, The Netherlands
Telephone: + 31 (0) 544 465139
Telefax: + 31 (0) 544 465194
E-mail: info@woody.nl
Internet: www.woody.nl

MAJOR RETAIL GROUPS
Blokker B.V.
Address: P.O. Box 94072,
1090 GB Amsterdam, The Netherlands
Telephone: + 31 (0) 20 5683568
Telefax: + 31 (0) 20 6651467
E-mail: blokker@blokker.nl

Speelgoedpaleis Bart Smit B.V.
Address: P.O. Box 69,
1130 AB Volendam, The Netherlands
Telephone: + 31 (0) 299 399599
Telefax: + 31 (0) 299 368195
E-mail: info@bartsmit.nl/
customers.service@bartsmit.nl
Internet: www.bartsmit.nl

Toys 'R Us Netherlands B.V.
Address: Atoomweg 400,
3542 AB Utrecht, The Netherlands
Telephone: + 31 (0) 30-2414183
Telefax: + 31 (0) 30-2414183
Internet: www.toysrus.nl

Otto Simon
Address: P.O. Box 18,
7600 AA Almelo, The Netherlands
Telephone: + 31 (0) 546 837777
Telefax: + 31 (0) 546 816417

Intertoys
Address: P.O. Box 506,
2800 AM Gouda, The Netherlands
Telephone: + 31 (0) 182 564500
Telefax: + 31 (0) 182 533201
Internet: www.intertoys.nl

Marskramer
Address: P.O. Box 126,
2800 AC Gouda, The Netherlands
Telephone: + 31 (0) 182 564400
Telefax: + 31 (0) 182-535588
Internet: www.marskramer.nl

MINOR BUYING GROUPS
Inter-Ring BV
Buying association of independent toys and games stores
Address: Hagerhofweg 16,
5912PN Venlo, The Netherlands
Telephone: + 31 (0) 77-3549241
Telefax: + 31 (0) 77 3514947
E-mail: abrink@intering.nl

Quintessence BV
Address: Peisenln 13,
3956VH Leersum, The Netherlands
Telephone: + 31 (0) 343 45 1238
Telefax: + 31 (0) 343 45 4784

Top 1 Toys
Franchise chain belonging to Otto Simon, which does the purchase of some basic articles.
Top 1 Toys has its own formula and also specialises in family (game) articles.
Address: Schuilenburglaan 1,
7604 BJ Almelo, The Netherlands
Telephone: + 31 (0) 546 83 7777
Telefax: + 31 (0) 546 81 3158

OTHER ASSOCIATONS
Fair Trade Organisation
Address: P.O. Box 115,
4100 AC Culemborg, The Netherlands
Telephone: + 31 (0) 345 545151
Telefax: + 31 (0) 345 521423
E-mail: info@fairtrade.nl
Internet: www.fairtrade.nl

Society 'The Genuine Toy': Stichting het Echte Speelgoed
15 wholesalers are members of this society that was formed in 1994 and focuses on exclusivity, thereby taking advantages of the niches left by large toys chains. It organises opportunities for purchase by individual retailers once a year.
Representative is the firm **Dolittle BV**. As mentioned before, Harlekijk Import BV is a member.
Dolittle BV
Importer and distributor of wooden speciality articles
Address: Markerkant 1515,
1314 AT Almere, The Netherlands
Telephone: + 31 36 5346163
Telefax: + 31 36 5346293

Gebra BV
Association of toy retailers
Address: P.O. Box 7105,
2701 AC Zoetermeer, The Netherlands
Telephone: + 31 (0) 79 351 43 21
Telefax: + 31 (0) 79 320 06 35
E-mail: info@gebra.nl
Internet: www.gebra.nl

DEPARTMENT STORES
Vroom & Dreesmann Warenhuis B.V.
Address: P.O. Box 276,
1000 AG Amsterdam, The Netherlands
Telephone: + 31 (0) 20 5959111
Telefax: + 31 (0) 20 6926150
Internet: www.vroomendreesman.nl/yesflash.asp

Hema B.V.
Address: P.O. Box 23220,
1100 DS Amsterdam, The Netherlands
Telephone: + 31 (0) 20 3114411
Telefax: + 31 (0) 20 3114000
Internet: www.hema.nl

De Bijenkorf B.V.
Address: P.O. Box 12870,
1100 AW Amsterdam, The Netherlands
Telephone: + 31 (0) 20 6218080
Telefax: + 31 (0) 20 6973926
Internet: www.bijenkorf.nl

MAIL ORDER
Wehkamp B.V.
Address: Meeuwenlaan 2, Antwoordnr. 400,
8000 AK Zwolle, The Netherlands
Telephone: + 31 (0) 38 4264777
Telefax: + 31 (0) 38 4264830
Internet: www.wehkamp.nl

FRANCE
Blanchet SA (ETS)
Importer and manufacturer of stuffed dolls
Address: Route Maisonnette,
36800 Le Pont Chrétien Chabenet, France
Telephone: + 33 (0) 2 54258059
Telefax: + 33 (0) 2 54258479

Comus France Sarl
Importer of electric toys
Address: 2 rue de la Pompadour,
94470 Boissy St Léger, France
Telephone: + 33 (0) 1 45691818
Telefax: + 33 (0) 1 45693054

Jacques Ferry et Cie.SA
Importer of toys and games
Address: Avenue Carrières,
13830 Roquefort la Bédoule, France
Telephone: + 33 (0) 4 42731616
Telefax: + 33 (0) 4 42731400

Pixi SA.
Importer of toys and games
Address: 25 rue Amelot, 75011 Paris, France
Telephone: + 33 (0) 1 43577354
Telefax : + 33 (0) 1 43571056
E-mail: info@pixi.fr
Internet: www.pixi.fr

Roda SA
Address: P.O. Box 13, 68650 La Poutroie, France
Telephone: + 33 (0) 3 89472334
Telefax: + 33 (0) 3 89472099
E-mail: info@roda.fr
Internet: www.roda.fr

Rodrigues (Etablissements) SA
Wholesaler and manufacturer of toys and gifts
Address: 12 rue d'Orléans, 49300 Cholet, France
Telephone: + 33 (0) 2 41620501
Telefax: + 33 (0) 2 41583674

Sandy
Importer and wholesaler of plushes, toys and gifts
Address: 447 rue Moulin,
59310 Auchy les Orchies, France
Telephone: + 33 (0) 3 20646949
Telefax: + 33 (0) 3 20616285
Internet: www.sandy.fr

GERMANY
Selecta Spielzeug
Importer and distributor of babies' articles, decorative toys, wooden games etc.
Address: Römerstraße 1, D-83533 Edling, Germany
Telephone: + 49 (0) 80 7110060
Telefax: + 49 (0) 80 71100640
E-mail: einkauf@selecta-spielzeug.de
Internet: www.selecta-spielzeug.de

Grosshandelzentralverband für spielwaren und Geschenkartikel eV
Importer and distributor of toys and gifts
Address: Max Joseph strasse 6,
8000 München, Germany
Telephone: + 49 89-557701
Telefax: + 49 89-593015

Ingo Uhl GmbH
Address: Quickborner Str. 27,
25494 Borstel-Hohenraden, Germany
Telephone: + 49 (0) 4101 74404
Telefax: + 49 (0) 4101 75245
E-mail: info@uhlgmbh.de
Internet: www.uhlgmbh.de

Beluga Spielwaren GmbH
Importer of electric toys
Address: Schützenstr. 35, 90513 Zirndorf, Germany
Telephone: + 49 (0) 911 607033
Telefax: + 49 (0) 911 609102

Hasbro Deutschland GmbH
Address: Max-Planck-Straße 10, D-63128 Dietzenbach, Germany
Telephone: + 49 (0) 6074 8060
Telefax: + 49 (0) 6074 806295
Internet: www.hasbro.de

Idee+Spiel
Address: Daimlerring 4, 31135 Hildesheim, Germany
Telephone: + 49 (0) 5121 761717
Telefax: + 49 (0) 5121 761727
E-mail: zentrale@idee-und-spiel.de
Internet: www.idee-und-spiel.de

Kaufmann Sortimentsgrosshandel GmbH
Address: Ithweg 35, 30851 Langenhagen, Germany
Telephone: + 49 (0) 511 725840
Telefax: + 49 (0) 511 775293

Ravensburger Spieleverlag GmbH
Address: P.O. Box 1860, 88188 Ravensburg, Germany
Telephone: + 49 (0) 751 860
Telefax: + 49 (0) 751 861346
Internet: www.ravensburger.de

Vedes – Vereinigung der Spielwaren-Fachgeschäfte
Address: Sigmundstr. 220 90431 Nuernberg, Germany
Telephone: + 49 (0) 911 6556
Telefax: + 49 (0) 911 655635
E-mail: vedes@nrz-gmbh.de
Internet: www.vedes.de

SPAIN
Alicantina de Juguettes S.L
Importer of toys
Address: Gabriel Miro, 8 Bajo,
03430 ONIL - Alicante, Spain
Telephone: + 34 9 66557635

Albero, Via Plana Y Cia, S.L.
Address: Avda. del Juguete, 22 Apartado 121,
03440 Ibi (Alicante), Spain
Telephone: + 34 6 555 25 37
Telefax: + 34 6 555 34 96
E-mail: avc@aefj.es
Internet: www.aefj.es/avc/

UNITED KINGDOM
Bafco Limited
Importer and manufacturer of children's rides
Address: 4 Beechings Way,
Alford LN13 9JE, United Kingdom
Telephone: + 44 (0) 1507 466536
Telefax: + 44 (0) 1507 463529
E-mail: sales@bafcolimited.com
Internet: www.bafcolimited.com

Brio LTD
One of the 17 distributors of BRIO articles worldwide.
See also www.brio.se/toy/address2.html
Importer of wooden toys and other toys.
Address: Messenger Close,
Loughborough LE11 1SP, United Kingdom
Telephone: + 44 (0) 1509 231874
Telefax: + 44 (0) 1509 234547
E-mail: info@brio.co.uk
Internet: www.brio.co.uk

Brookite Ltd

Address:	Brightley Mill, Okehampton EX20 1RR, United Kingdom
Telephone:	+ 44 (0) 1837 53315
Telefax:	+ 44 (0) 1837 53223
E-mail:	sales@brookite.com
Internet:	www.brookite.com

Furrytails Ltd

Importer of plush toys

Address:	26-28 Standard Road, London NW10 6EU, United Kingdom
Telephone:	+ 44 (0) 20 8965 6836
Telefax:	+ 44 (0) 20 89652172
E-mail:	furrytails@compuserve.com
Internet:	www.furrytails.co.uk

Gray Nicholls

importer of toys and games

Address:	Station Rd, Robertsbridge TN32 5DH, United Kingdom
Telephone:	+ 44 (0) 1580 880357
Telefax:	+ 44 (0) 1580 881156

James Galt & Company Ltd

Address:	Brookfield Road Cheadle, Cheshire SK8 2PN, United Kingdom
Telephone:	+ 44 (0) 161 4289111
Telefax:	+ 44 (0) 161 4286597
E-mail:	mail@galt.co.uk
Internet:	www.galt.co.uk

Hobbygames Ltd

Address:	Unit S4 Rudford Ind. Est. Ford Airfield, Arundel, BN18 0BD, United Kingdom
Telephone:	+ 44 (0) 1903 730998
Telefax:	+ 44 (0) 1903 731141
E-mail:	purchasing@hobbygames.com
Internet:	www.hobbygames.com

Rexard Enterprises Ltd

Address:	Enterprise House, St Lawrence Avenue, Worthing, West Sussex, BN14 7JH, United Kingdom
Telephone:	+ 44 (0) 1903 820804
Telefax:	+ 44 (0) 1903 213251

APPENDIX 11 USEFUL INTERNET SITES

http://www.toy-icti.org/
The International Council of Toy Industries (ICTI) was formed in 1974 as an association of toy trade associations from around the world. The products of its member countries encompass the full range of toys, playthings and related merchandise. It is incorporated as a non-profit corporation under the laws of the State of New York and has these objectives:

- To promote the interest of toy manufacturing in its 20 member countries
- To act as a centre for discussion and the exchange of information on a regular basis to improve communications on important toy industry issues and trends
- To promote toy safety standards
- To foster relationships with those interested in the design and educational value of toys
- To reduce or eliminate barriers to trade
- To foster relationships with consumers and accredited representatives of the trade
- To undertake such projects and to initiate such action as shall be approved by the Council in its meetings.

Their website provides information on news and publication, trade events and addresses of related organisations.
(Language: English)

http://www.tietoy.org/
TIE is the association for Europe's toy industry. Its main objective is to represent the interests of the toy industry to the instutions of the European Union and to support association members in each member state of the EU.
It promotes and defends the industry's interests on issues such as advertising, free international trade, toy safety regulations and highlights the significant contribution that toys play in the psychological development, socialisation and entertainment of children.
(Language: English)

http://www.aiju.es
AIJU is a scientific Spanish organisation that publishes most recent and interesting documents on investigation of various types of toy items. It furthermore has information on ways to supply European markets effectively.
(Language: English and Spanish)

http://www.toy-tte.org/
This website of the Toy Trader of Europe (TTE) provides information on the market of toys and links to other major toy websites. The TTE is the only European Association representing the toy trade and is exclusively dealing with the interests and the needs of the trade in regard to the harmonisation at European level of national requirements.
(Language: English)

http://www.btha.co.uk/
The purpose of the British Toy & Hobby Association is to promote and, where possible to bring about, the most benign commercial, industrial and political climate for its members activities; also, in circumstances where the collective interests are specifically threatened, to organise and conduct appropriate defence. On this Internet site you can find information on toy safety, toy trust and press releases.
Moreover, the website provides a complete Safety Guide of the British Association of Toy Retailers (BATR) including a history of toys in the 1900s and current sales figures for the UK.
(Language: English)

http://mineco.fgov.be/protection_consumer/security/security_toys/home_en.htm
This site give valuable information on safety standards.
(Language: English, Dutch, German, Spanish, French)

http://www.toy.de
Information on the German market of toys and games, including statistics and press releases.
(Language: German)

http://www.spielwarenmesse.de
Information on the German market of toys and games, including statistics and press releases.
(Language: German and English)

http://www.toydirectory. com/news.htm
Toydirectory has positioned itself as a hub between retailers on the one hand and manufacturers at the other hand.
It provides opportunities to set out contact with retailers as well as a list that tells you what types of products retailers want to buy.
(Language: English)

http://www.tdctrade.com/tdcnews/9904/99040601.htm
This website presents notes on recent developments in the consumer market for toys.
(Language: English)

http://www.tradebizz.pl/branches/toys/instyt/itma_en.html
International Toy Magazines Association (ITMA) assembles titles which are present on the international market of the sector's press which are concerned with the production and sale of toys. Its main aim is to help to exchange of information and experiences between the members of the association and impart information to people connected with the sector.
(Language: English)

http://www.toy-tma.com/
The mission of Toy Industry Association, Inc. is to promote industry growth globally, to ensure the industry's right to market and manufacture fun, educational and safe products for all ages in a free and fair manner, and in so doing support the positive development of children. Their Internet site provides information on industry events, worlds toys statistics, fairs and news.
(Language: English)

http://www.toy-tte.org/magazine.htm
The Toy Traders of Europe is the only European Association representing the toy trade exclusively dealing with the interests and the needs of trade in regard to the harmonisation at European level of national requirements.
(Language: English)

http://www.toys88.com/
This site provides information on toys manufacturers, market news, toys fair and safety requirements.
(Language: English)

http://www.toysource.com/news/
ToySource B2B Toy Marketplace is the largest global toy and related products exchange, providing an open neutral market for toy manufacturers, buyers, and intermediaries to conduct real-time online transactions for all types of child-related products. Their Internet site provides information on industry, market places, trade fairs and events.
(Language: English)

CBI puts you in touch with the markets of Europe

CBI, the Centre for the Promotion of Imports from developing countries, is an agency of the Netherlands Ministry of Foreign Affairs. Since its establishment in 1971, CBI operates within the policy framework set by the Minister for Development Co-operation. Its mission is to contribute to the economic independence of developing countries. To fulfil this mission, CBI aims at strengthening the competitiveness of companies in those countries on international markets, primarily the West-European market, by improving conditions in enterprises and business support organisations. CBI considers social values and compliance with the most relevant environmental requirements to be an integral part of its policy and activities

CBI offers various programmes and services to its target groups:

Market information
- CBI News Bulletin (6 times annually);
- CBI guide "Exporting to the European Union";
- Market surveys and strategic marketing guides covering the EU including The Netherlands;
- Quick scans on environmental, social and health issues;
- Manuals on subjects such as technical and environmental regulations, trade fair participation, Fashion Forecast etc.;
- CBI's extensive Web site at www.cbi.nl providing general information about CBI, details about CBI programmes, CBI publications (downloadable free-of-charge) and the GreenBuss database on European trade-related environmental policy and technology;
- CBI' s Trade Documentation Centre offering supply-related information to importers, such as exporters' directories, country and sector information, periodicals from developing countries, and - to visiting exporters - demand-related information such as market information, trade magazines, address books of European companies etc.

Matching services
CBI's computerized exporters' and importers' databases, containing around 3,500 regularly updated company profiles, are instrumental in providing buyers and suppliers with relevant company data on potential trade partners.

Export promotion programmes (EPP)
Step-by-step approach providing intensive assistance to selected exporters in developing countries in order to obtain a firm and lasting position on the EU market. Made to measure, demand- driven and flexibility are combined with fixed elements such as:
- pre-selection of candidates based on written documentation;
- technical assistance during company visits and distance guidance by CBI branch experts;
- export marketing training (for instance through the EXPRO seminars);
- market entry (for instance via participation in European trade fairs);
- market consolidation by way of follow-up support, further technical assistance and/or repeat market entry activities.

Human resources development
- BSO MARKET INTEL: five-day seminar in Rotterdam for relevant middle management staff of BSO's, aiming at supporting BSO's in establishing or improving a Market Information Service (MIS);
- CAPITA: two-week seminar in Rotterdam for specific industry & trade associations. Aims to provide –through their associations- specific industries or sectors in developing countries with tools to engage in business relations with importers and/or manufacturers in the EU;
- BSO-FAME: two-week seminar in Rotterdam for project managers of BSOs focusing on practical knowledge and applicable tools in export promotion to international markets in general and the European market in particular;
- IntFair: two-week seminar in Rotterdam for BSO staff members on the organization of collective participation in European trade fairs;
- Expro: seven-day seminar in Rotterdam on export marketing and management for selected exporters participating in a CBI export promotion programme;
- Workshops in developing countries: 2-4 days for BSOs and/or exporters, focussing on general export marketing and management, a specific product sector or on specific subjects.

Multilateral co-operation
CBI co-operates with the International Trade Centre (ITC/WTO) to globalize trade promotion and with other European import promotion organizations to increase efficiency and effectiveness by combining efforts.

Please write to us in English, the working language of the CBI.

Centre for the Promotion of Imports from developing countries
Centrum tot Bevordering van de Import uit de ontwikkelingslanden

Mailing address:
CBI
P.O. Box 30009
3001 DA Rotterdam
Phone +31 (0) 10 201 34 34
Fax +31 (0) 10 411 40 81
E-mail cbi@cbi.nl
Internet www.cbi.nl

Office and showroom:
WTC-Beursbuilding, 5th Floor
37 Beursplein, Rotterdam,
The Netherlands.

Mailing address: P.O. Box 30009, 3001 DA Rotterdam, The Netherlands
Phone: +31 10 201 34 34 Fax: +31 10 411 40 81
E-mail: cbi@cbi.nl Internet: http://www.cbi.nl
Office and showroom: WTC-Beursbuilding, 5th floor
37 Beursplein, Rotterdam, The Netherlands