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2024, return to Growth for Toy ?

YTD September 2024 review

October 23th, 2024

Toy Belgium gets back to growth in volume and aligned with Europe global trend

	VALUE	UNIT	PRICE
Belgium	**-3%** (**-8%** YTD'23 vs 22)	**+1%** (**-10%** YTD'23 vs 22)	**-4%** (16€)
EU	**-2%** (-3% YTD'23 vs 22)	**-2%**	**Flat** (13€)

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EU7: NL,BE,FR,UK,SP,IT,GE

Source: Circana | Retail Tracking Service | EU7 | YTD September 24

Toy's resilience to external headwinds

BIRTH RATE
-3%
2023

CONSUMER CONFIDENCE
-6%
YTD September

EASTER HOLIDAYS
Wallonia

RAIN
+18%
Spring 2024

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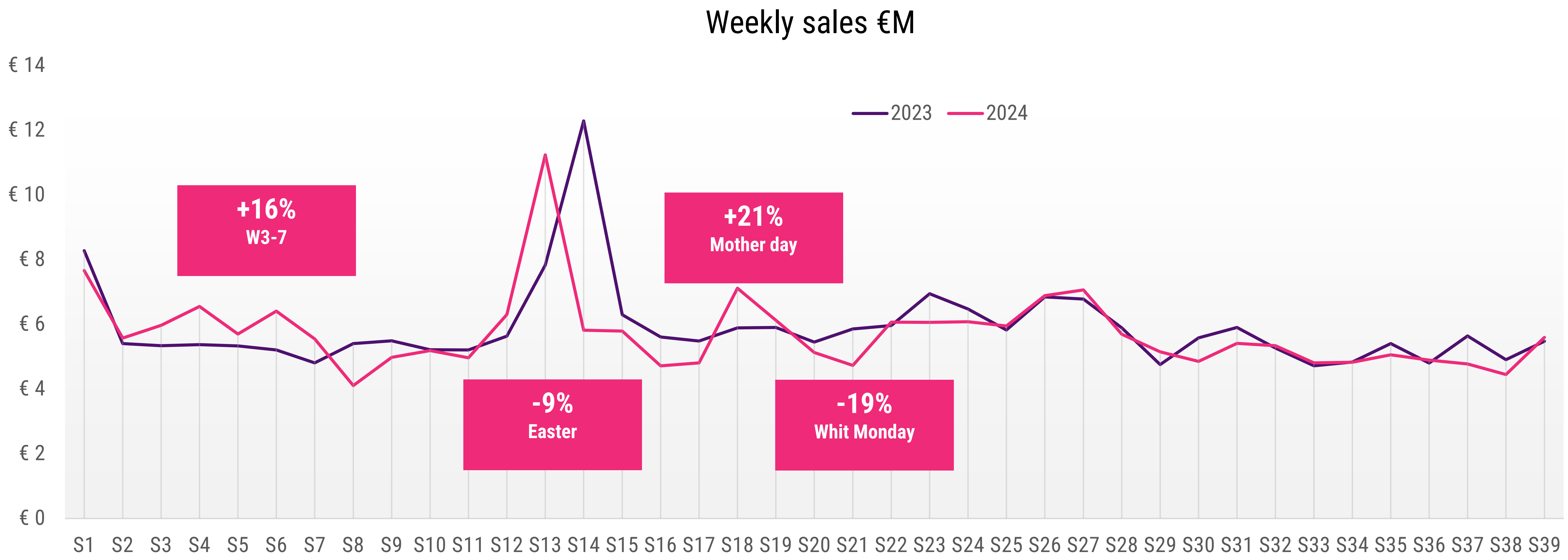
Source: : meteobelgique.be, , banque natio

School Easter holidays impactul on toy (-9%)



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Source: Circana | Retail Tracking Service | Belgium | YTD September 24

Top Toy headwinds

Strategic card games	Playground	20-50€
-22%	**-11%**	**-8%**
3% share but **10%** of the market decline Pokemon	10% share and 7% of losses	**1/3** of sales 20-30€: -7% 30-40€: -8% 40-50€: -9%

Source: Circana | Retail Tracking Service | Belgium | YTD September 24

Top Toy tailwinds

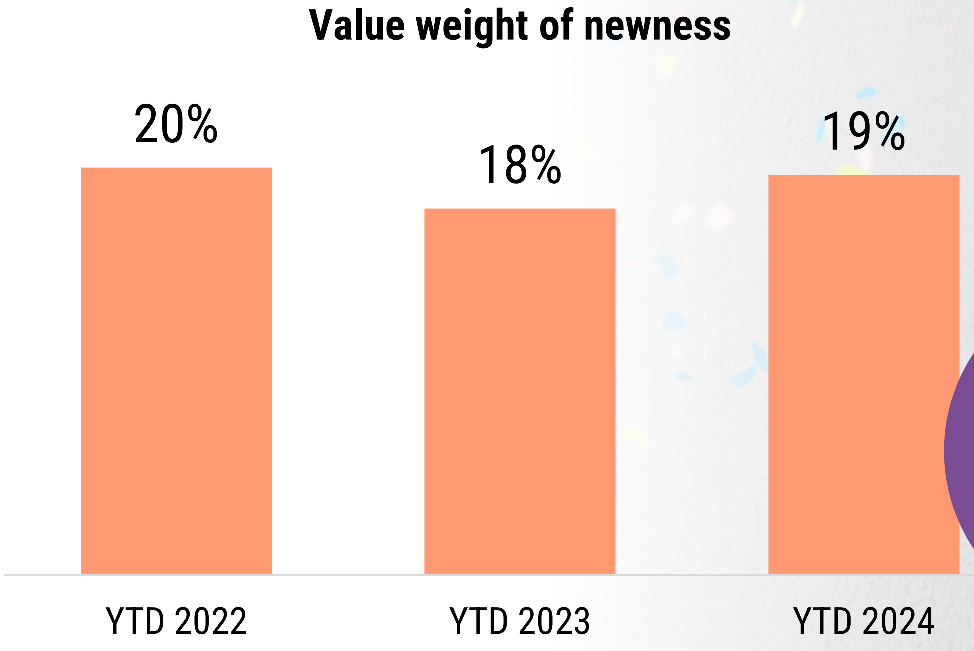
Kidult still an opportunity for the toy market

Kidults	Collectibles	Animals
+4%	**+7%**	**+15%**
14% share Toy designed for older age groups	UEFA, Squishmallows, LEGO minifigurines etc	**15% of share**

Source: Circana | Retail Tracking Service | Belgium | YTD September 24

Toy attractivity through newness

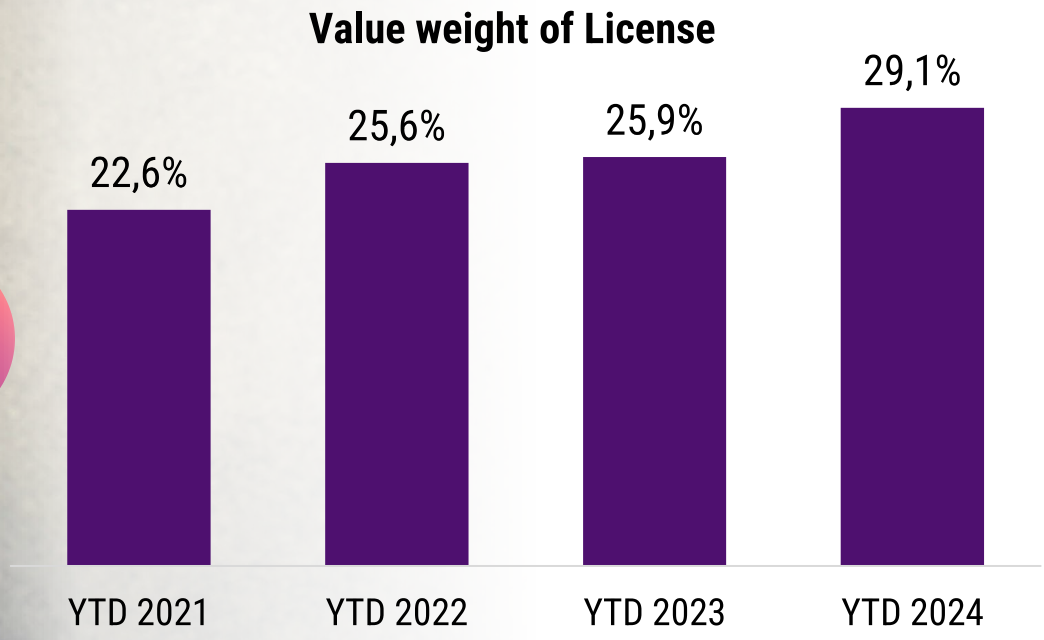
And still potential



Source: Circana | Retail Tracking Service | Belgium | YTD September 24

…and licensed toys

+9%
YoY



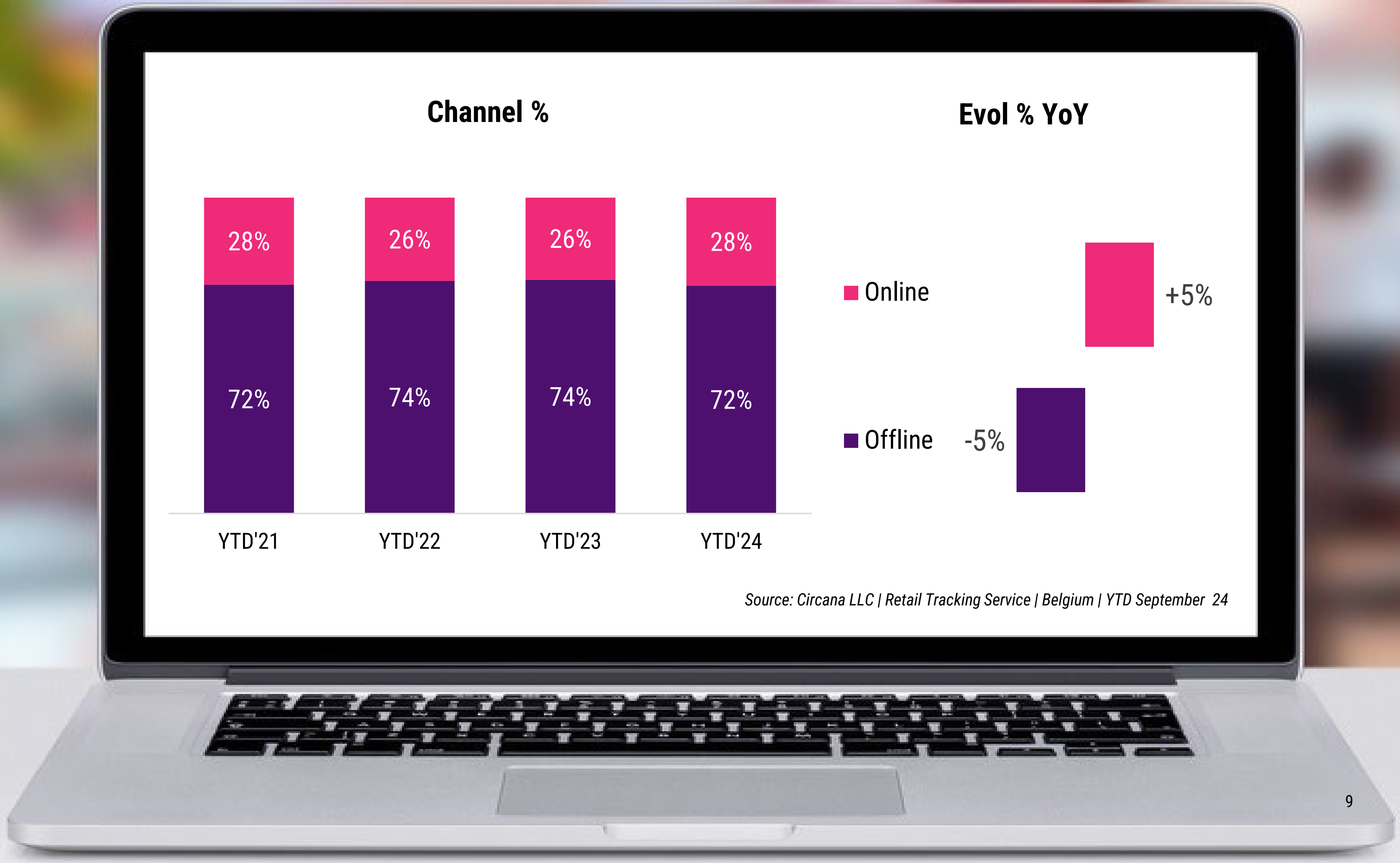
#1 STAR WARS

#2 Harry Potter

#3 UEFA EURO2024 GERMANY

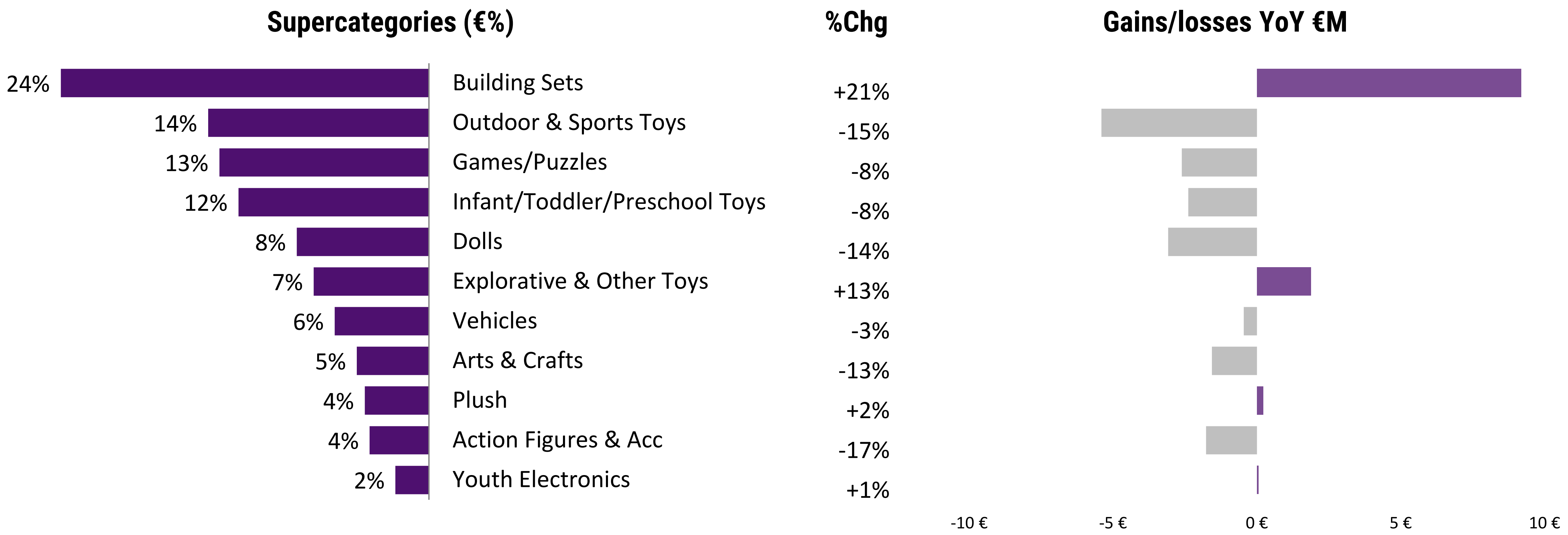
Source: Circana LLC | Retail Tracking Service | Belgium | YTD September 24

Online grew +5% and gets back to its post-covid position



Building Sets stands out

3 supercategories are growing out of 11



Source: Circana LLC | Retail Tracking Service | Belgium | YTD September 24

Top 5 toy market boosters

Building sets is the largest growing offer with LEGO but not only!

Subclasses

1.Building Sets (4+)
+23%

2.Trading Card
X3,6

3.Robots
+22%

4.Traditional Plush
+4%

5.Adult Games
+23%

Manufacturers

1.LEGO
+21%

2.Topps
New

3.Specton
+10%

4.Jazwares
+19%

5.Schleich
+31%

Properties

1.LEGO Botanicals
+++

2.UEFA
+++

3.Mclaren
X4

4.Lilo & Stitch
X2

5.LEGO Disney
X3

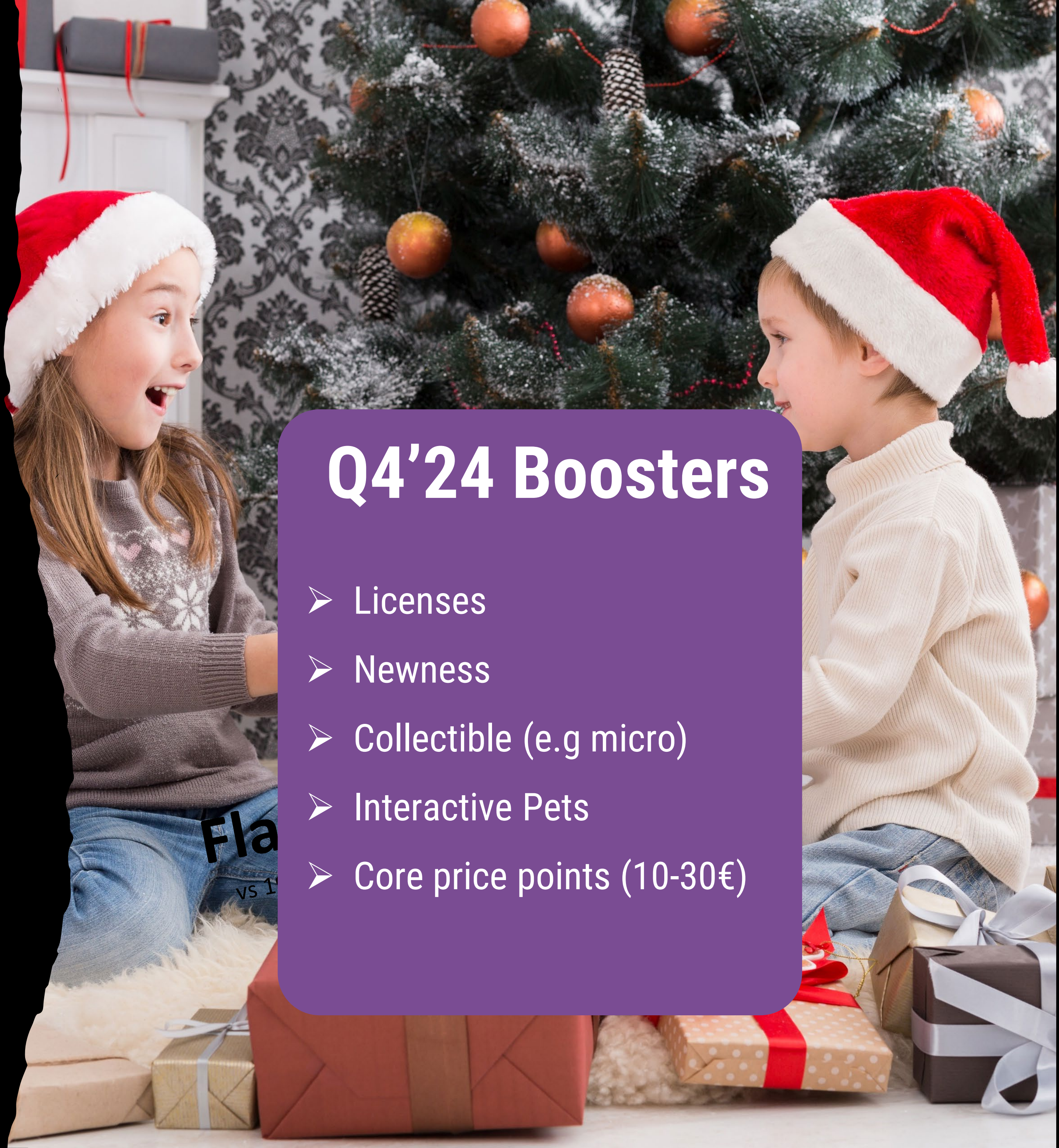
Source: Circana | Retail Tracking Service | Belgium | YTD September 24

What perspective for Q4?

Q4’23 Picture

- Value -6%
- Volume : -8%
- Price: +2%

- Last minute purchases (Oct+Nov: -11%)
- 9/11 declining categories



Q4’24 Boosters

- Licenses
- Newness
- Collectible (e.g micro)
- Interactive Pets
- Core price points (10-30€)

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Merci

Speakers

Marianne JAMIN
Account Manager Toys
marianne.jamin@circana.com

Nicolas PONS
Retail Europe Deputy
nicolas.pons@circana.com

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