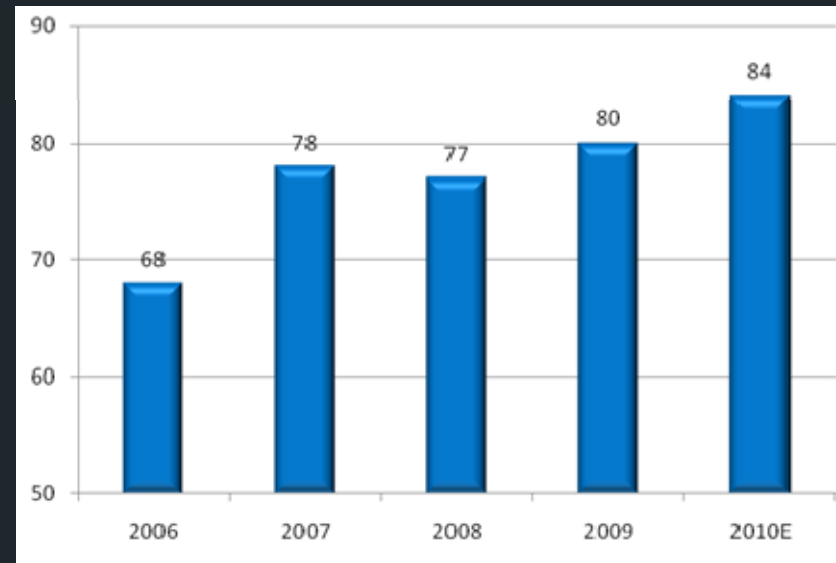


## Global and China Toy Industry Report, 2010



In 2009, influenced by the financial crisis, the global toy sales turned out to be US\$80 billion, an increase of 3.6% compared with US\$77 billion in 2008. Along with the gradual recovery of global economy in 2010, the toy industry also takes a turn for the better; promisingly, global toy sales in 2010 will be raised by 5.4% compared with the prior year, hitting US\$84.3 billion. The USA, Japan, and China rank the Top 3 of toy sales worldwide with the respective sales of US\$21.5 billion, US\$5.8 billion, and US\$4.9 billion, while Britain, France, Germany, Brazil, India, Australia, and Canada take the 4th-10th position. The Top 10 countries occupy 66% of the global total sales of toys.

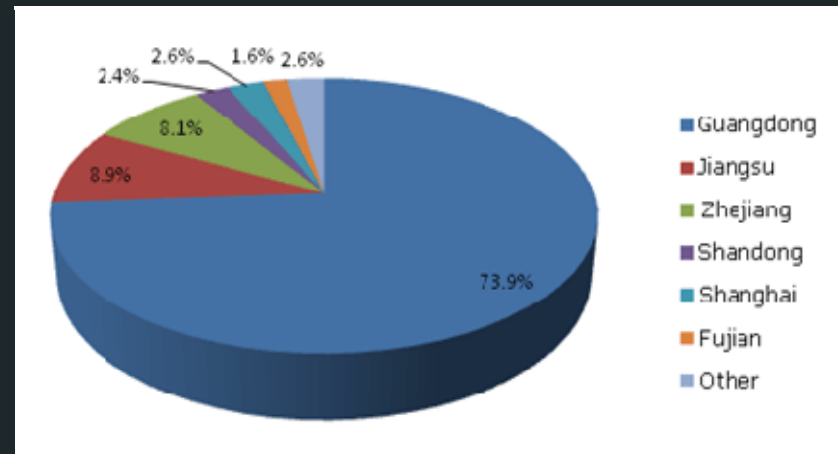
### Global Toy Sales, 2006-2009 (Unit: US\$ bn)



Source: WIND; ResearchInChina

China is the world's largest toy manufacturer and exporter, and over 2/3 of global toys are made in China; the export value of Chinese toys in 2009 reached US\$7.8 billion. Guangdong, Jiangsu, Zhejiang, Shanghai, and Shandong are the foremost production and export bases of toys in China, accounting for more than 90% of the annual sales of Chinese toys, of which, Guangdong gives priority to electric toys and plastic toys; Jiangsu and Shanghai are mainly engaged in plush toys; Zhejiang gives first place to wooden toys.

### Distribution of Toy Export in China, 2009



Source: WIND; ResearchInChina

In 2009, among the 11 categories of exported toys of China, 8 categories experienced declines; of which, the export value of animal toys was US\$1.36 billion, down 24.2%. While the export value of intellectual toys and toy sets amounted to US\$520 million and US\$500 million, respectively, up 6.6% and 1.5%. In pace with the upgrading of technology, changes have been made to the toy export industry: developed countries have diverted their demands of toys to top-grade types such as adult toys, high-tech electric toys, intellectual & educational toys from traditional medium and low-grade products like plastic toys and stuffed toys. Electric toys and online toys produced with high & new tech become the new development orientation.

China's plush toys enjoy relatively large shares in European & American market, but the low-price edge and processing trade only brings along meager profits and more than 90% are OEM products. With the appreciation of RMB as well as the rise of labor cost, the manufacturing cost of plush toys goes up and the market share decreases gradually; wooden toys approximately occupy 10% of the market share, with the focus shifting from traditional wooden toys to intellectual wooden toys, pet wooden toys, etc.

And China's intellectual toys have a broad prospect, but relevant standards need to be released so as to guarantee the healthy development of the market.

From the perspective of annual average consumption of toys by children worldwide, China sees only US\$20, while Australia and the USA reach respective US\$401 and US\$280. At present, the population of Chinese juvenile and children has hit 300 million, so, there is huge potentiality of toy consumption in domestic market. On the other hand, as we entering 2010, the Echo Boomers born in 1980s will become the main force of toy consumption. It is predicted that the demand of domestic toy industry will increase dramatically in the following several years.

Facing the rising market demand, major toy enterprises in China have worked out ambitious development plans.

Guangdong Alpha Animation and Culture Co., Ltd. raised RMB860 million from the IPO in 2009, which enables it to carry out integrated operation of animation industry chain through merging and acquiring excellent domestic enterprises. In March 2010, it invested RMB90 million to acquire a 60% stake in Guangdong Jiajia Cartoon Film Co., Ltd. in an effort to obtain rare media channel resources and promote the release of animated films and the selling of cartoon toys.

Based on the current 21 brands and 190 models of model cars, Xinghui Auto Model Co., Ltd. plans to get the model car authorization of foreign brands including Porsche, and domestic brands including Hongqi, Chery and BYD in the coming three years, striving for the authorization of 26 brands and over 300 models. Restricted by output capacity, the products of Xinghui Auto Model Co., Ltd. are mainly sold to foreign countries and first-tier domestic cities like Beijing and Shanghai; the company will further expand its market in second and third-tier domestic cities after the improvement of its output capacity in the future.

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