



Toys & Hobby Report 2020

Statista Consumer Market Outlook – Market Report

December 2020

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- Market drivers
- Consumer insights
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- Trends

02 Segments

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OVERVIEW



Global trends, like digitalization and VR, have a strong impact on the Toys & Hobby market

Overview: management summary

The Toys & Hobby market covers a wide variety of products generally used for leisure activities. In this report, growth potentials, market drivers, consumer insights, key companies, and future developments of the Toys & Hobby market worldwide will be discussed.

The market is divided into three segments: Toys & Games, Musical Instruments and Sports Equipment. The Toys & Games segment accounts for the biggest share, representing more than half of total sales. Overall, Toys & Hobby products generated US\$452 billion in sales worldwide in 2019. With US\$234 per capita in 2019, people in Australia spent the most on Toys & Hobby items.

The Toys & Hobby market is mostly driven by consumer spending in general. Consumer spending includes various factors, such as per-capita income, household debt levels, and consumer expectations. Worldwide, the spending on recreation and culture will increase at a CAGR of 2.1% between 2017 and 2022.

For a closer look on consumers perspectives in recent years, we asked people in the U.S. about their preferences concerning toys. Our research shows that the general trend of digitalization have a strong presence in the market, with 29% of surveyed preferring online purchases, and 40% using both online and offline channels equally. Further, we found out that electronic devices take children's number-one toy spot regardless of their age.

The market is dominated by a few key players such as LEGO, Mattel, Amer Sports and Yamaha. With more than US\$5.6bn in 2018, LEGO has the highest toy sales among the companies, followed by Mattel with US\$4.5bn.

The following trends currently shape the market and are the industry's answer to a changing consumer interest: STEM toys, aimed to teach kids tech skills and math in an amusing way, are taking off. In addition to that, virtual and augmented reality can be gamechangers in the videogames industry.

The Toys & Hobby market is divided into three segments and 17 sub-segments

Overview: segments

Toys & Games



Dolls & Stuffed Toys

Construction Sets & Models

Card Games

Puzzles

Toys for Toddlers & Kids

Plastic & Other Toys

Video Game Consoles

Musical Instruments



Acoustic Pianos & Stringed Keyboard Instruments

String Instruments

Wind Instruments

Percussion Instruments

Electronic & Electromechanical Musical Instruments

Parts & Accessories of Musical Instruments

Sports Equipment



Winter Sports Equipment

Summer Sports Equipment

Other Sports Equipment

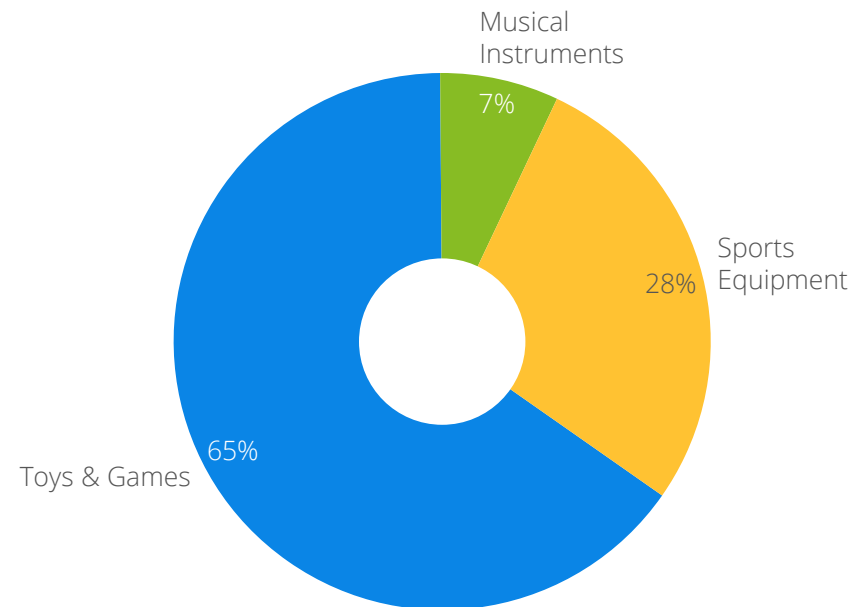
Fishing Articles & Equipment

With 65%, the Toys & Games segment accounts for the biggest share in the Toys & Hobby market

Overview: key takeaways

- The global Toys & Hobby market realized a total revenue of US\$452 billion in 2019.
- With 65%, Toys & Games is the largest segment of the Toys & Hobby market with US\$297 billion in revenues in 2019, followed by the Sports Equipment segment (US\$122 billion). The smallest segment is Musical Instruments (US\$33 billion).
- All segments are expected to grow between 25% to 35% from 2019 to 2025.
- From an international perspective, the most per capita revenue in the Toys & Hobby market was generated in Australia in 2019 with US\$234.
- Key players include large companies like LEGO, Mattel, Amer Sports and Yamaha

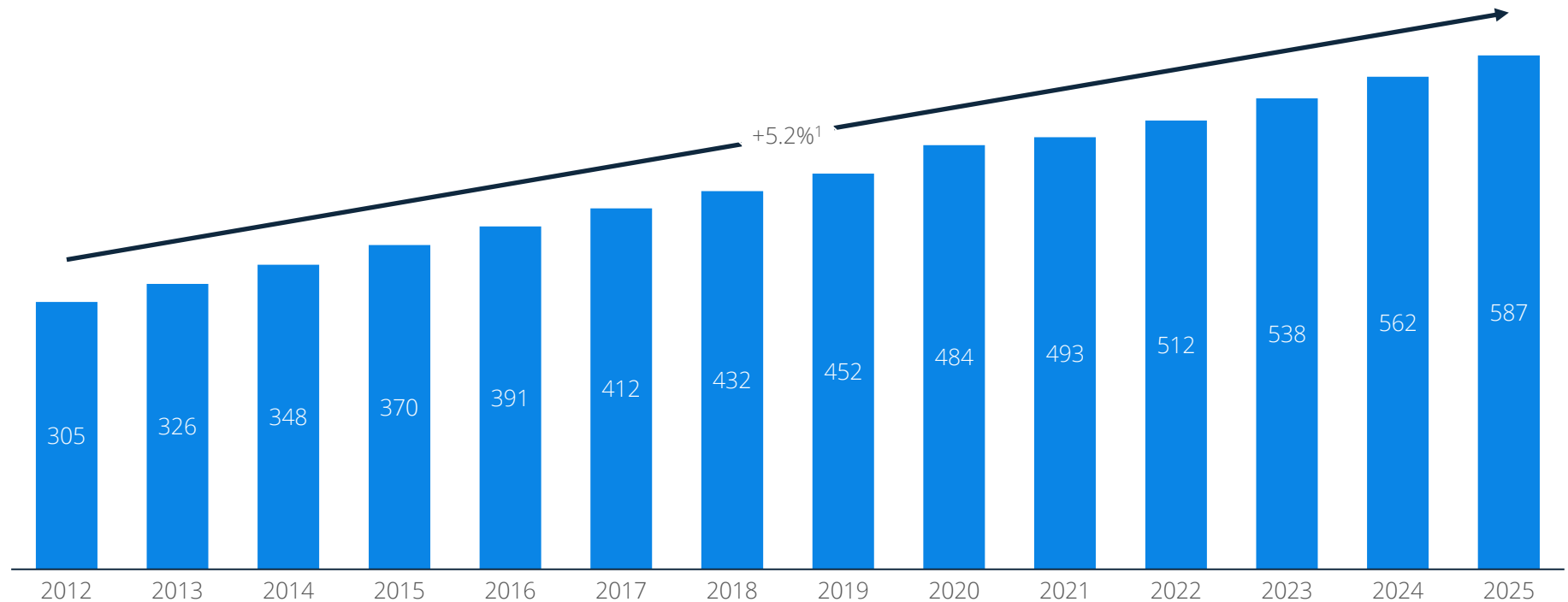
Worldwide revenue share in 2019



In 2019, the Toys & Hobby market realized a revenue of US\$452bn worldwide

Overview: sales figures (1/4)

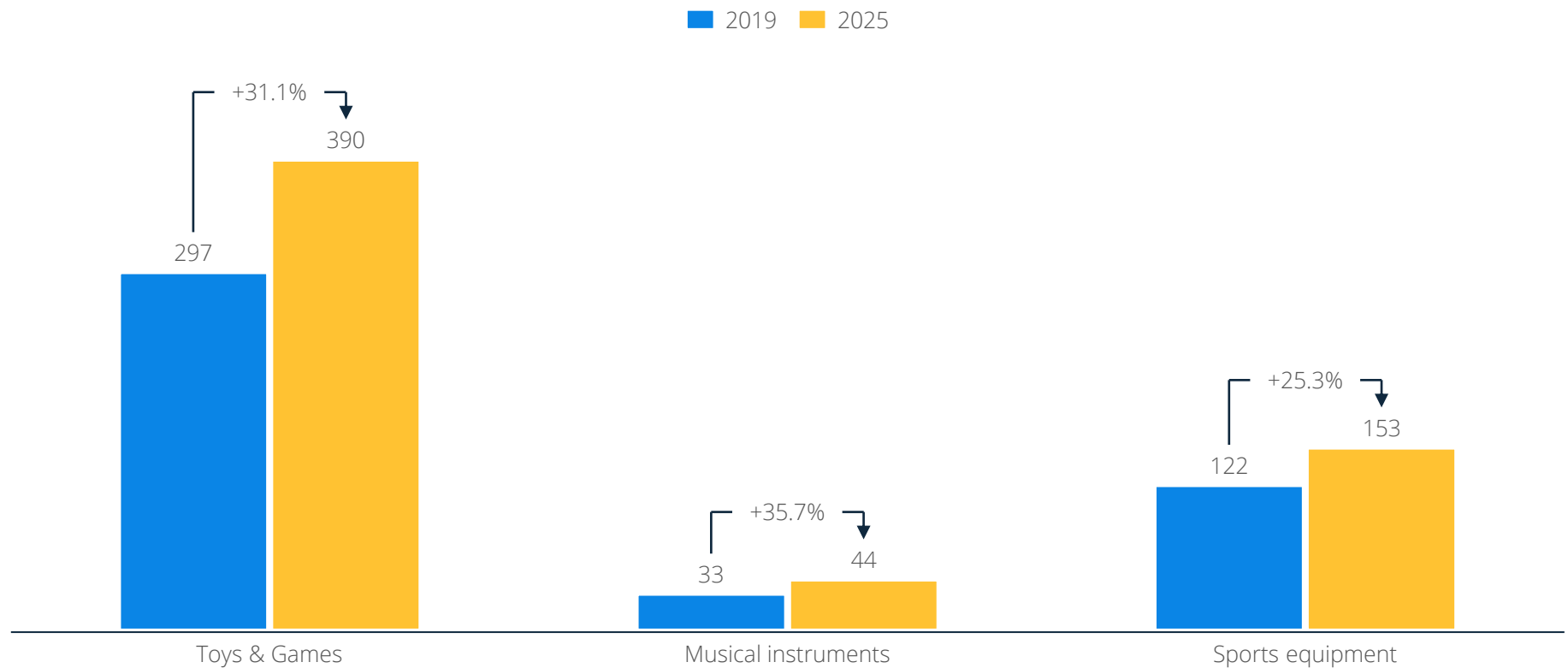
Worldwide revenue in billion US\$



The Musical Instruments segment has the highest growth potential with 36% from 2019 to 2025

Overview: sales figures (2/4)

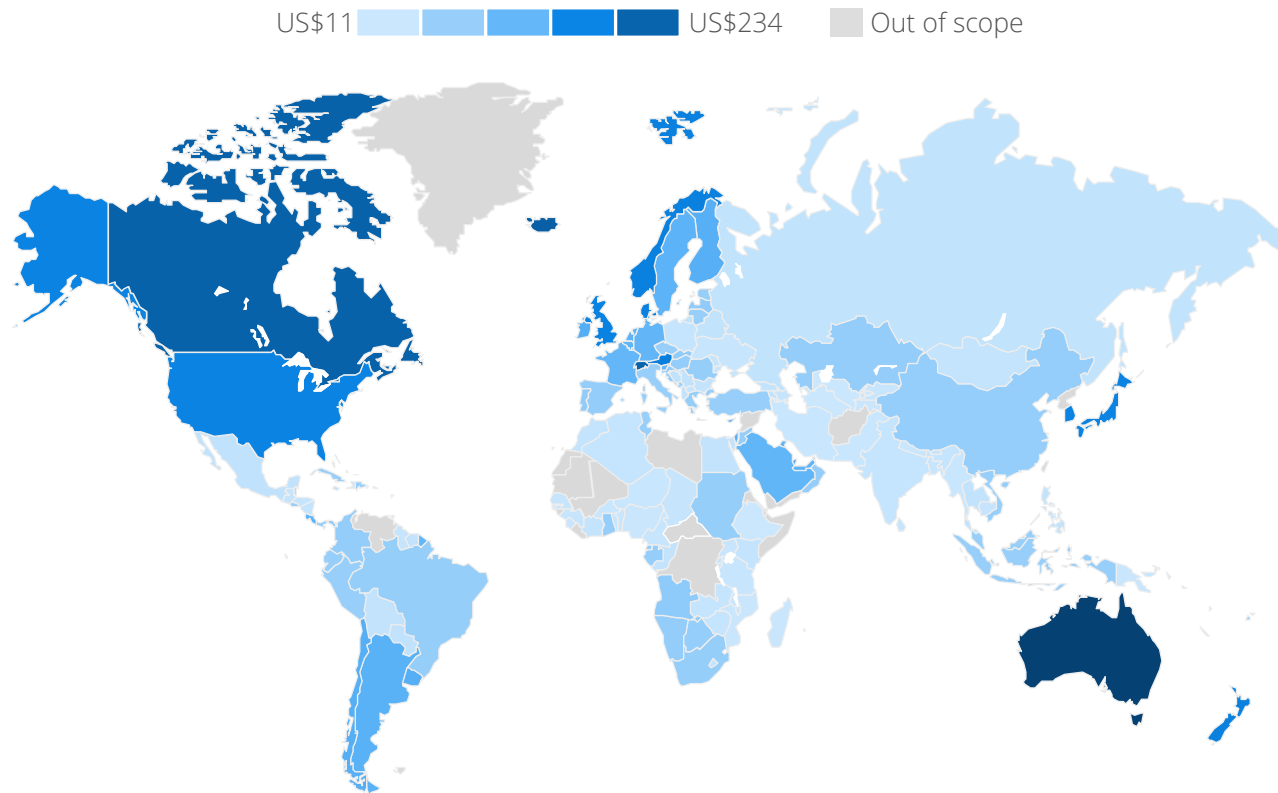
Worldwide revenue in billion US\$



With US\$234 per capita, Australians spent the most on Toys & Hobby items in 2019

Overview: sales figures (3/4)

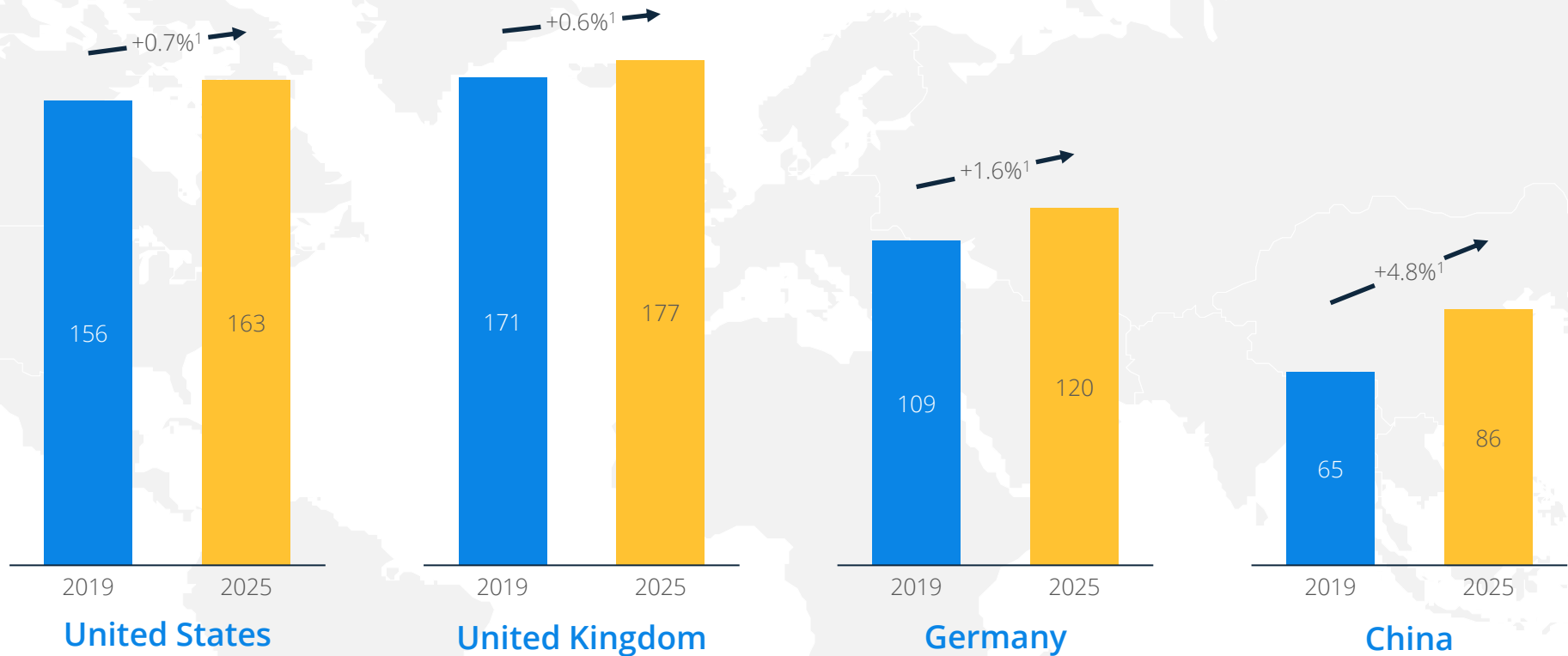
Per-capita revenue in US\$ in 2019



The Chinese per capita revenue is expected to gain the most at a CAGR¹ of 5% from 2019 to 2025

Overview: sales figures (4/4)

Growth and per capita revenue in US\$

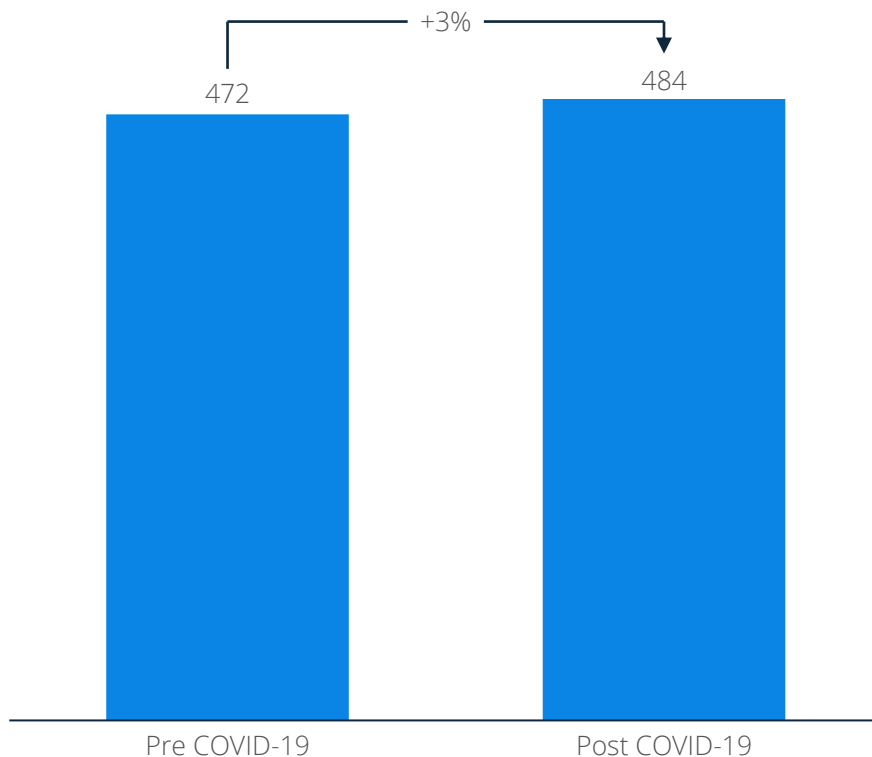


1: CAGR: Compound Annual Growth Rate / average growth rate per year
Source: [Statista Consumer Market Outlook 2020](#)

The Toys & Hobby market is expected to witness a COVID-19-related revenue increase of 3%

Overview: COVID-19 impact (1/2)

Worldwide Toys & Hobby revenue in billion US\$ in 2020



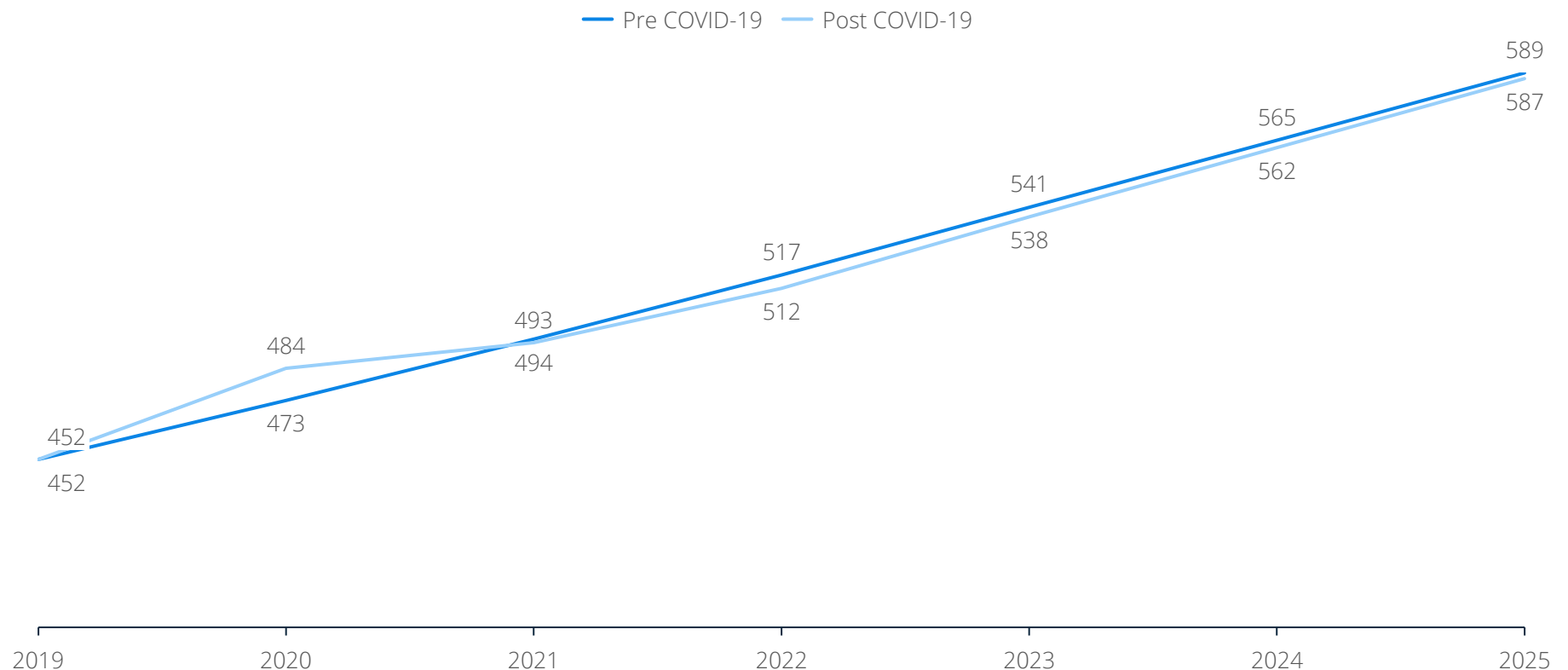
Pandemic likely to result in recession followed by v-shaped recovery

- The Corona pandemic will play out economically as an external shock to consumption. Its immediate effect on the toys and hobby industry is on a historic scale.
- This shock directly affects face-to-face commerce like store retail due to the closing of stores. Additionally, outdoor sports are also greatly restricted. On the other hand, the consumption of toys & game is encouraged due to the lockdown policy and the shutdown of schools.
- Therefore, our estimated revenues for the toys and hobby market in 2020 have been adjusted by 3%.
- We do not anticipate a reversal of long-term trends, but a dissipation of the pandemic-induced shock over the next years. It remains to be seen how consumer's buying moods will develop.
- The forecasts are dependent on governments' ability to „flatten the curve“ of infections, the post-pandemic economic outcomes and labor market situations. A „second wave“ or continued high levels of infections would lead to further downgrading in 2020.

The worldwide Toys & Hobby market is expected to reach only US\$484 billion in 2020

Overview: COVID-19 impact (2/2)

Worldwide Toys & Hobby revenue in billion US\$



MARKET DRIVERS



In 2018, consumer spending in the United States reached US\$40,510

Market drivers: consumer spending (1/2)

Consumer spending is the average per-capita spending of private households. Consumer spending is influenced by various factors. Key determinants include income, household debt levels, and consumer expectations.

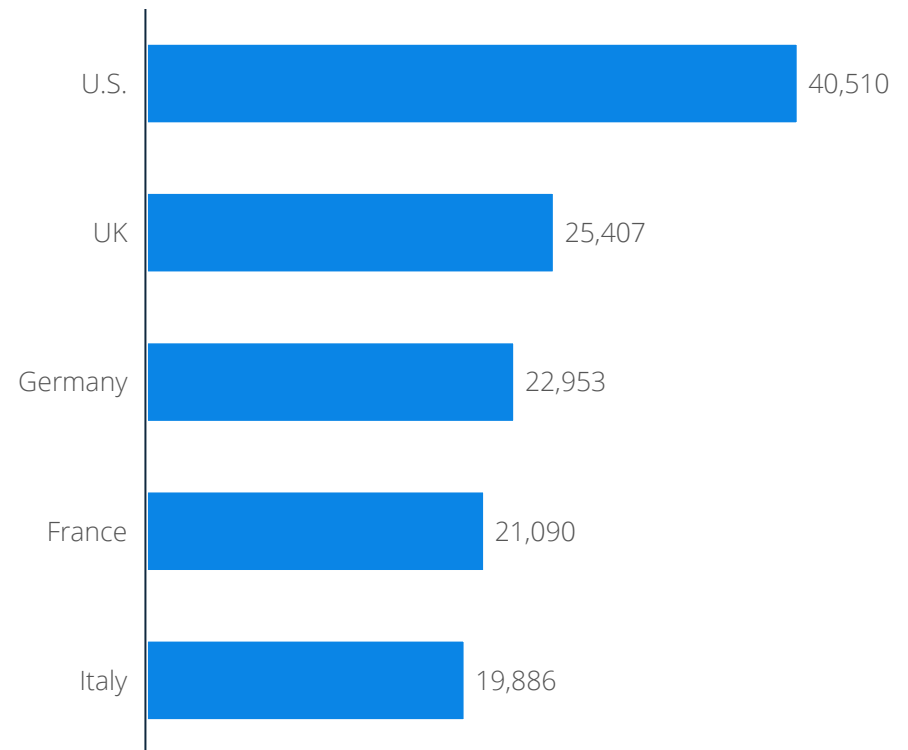
As disposable income levels are constantly increasing, demand is growing as well, and with it the economy as a whole¹. In addition, per-capita income also plays a significant role. It indicates how much money each person has to spend on average. Per-capita income sheds light on how the standard of living develops over the years. This is particularly important for products generally used for leisure activities, like toys and hobby products.

The level of household debt, especially in relation to the disposable income, shows how much people really have left to spend. Household debt levels have reached new heights, and especially the increasing health care costs have contributed to the worldwide rise in debt.

Consumer confidence also impacts consumer spending. Depending on how confident people are, they spend their money or they save their money. In other words, it includes people's expectations of the country's economic development, how the prices will develop and if an inflation is likely to happen. The more stable the economic situation, the more confidently people spend their money.

The development of consumer spending indicates how the industry and economy are going to evolve. Consumer spending in the United States is one of the highest worldwide and is expected to grow even more.

Consumer spending per capita in US\$ in 2018



Worldwide spending on recreation and culture will increase at CAGR of 2.1% between 2017 and 2022

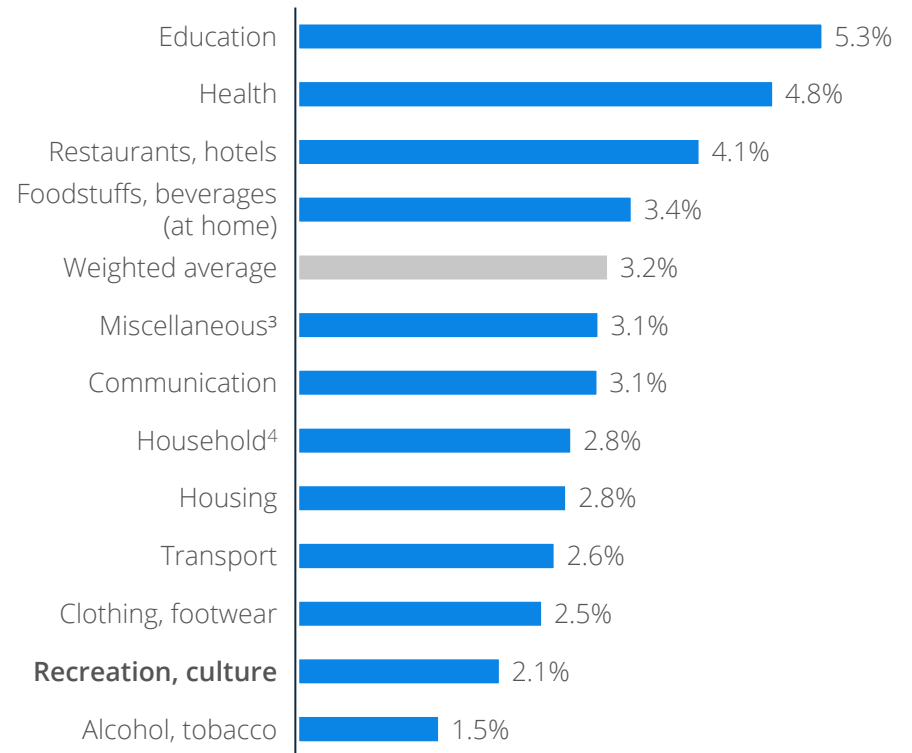
Market drivers: consumer spending (2/2)

National statistical offices estimate the consumption of private households as part of their mission to measure economic activity at large. Consumption expenditure can be classified according to the Classification of Individual Consumption by Purpose (COICOP) into twelve categories, which can be seen in the diagram on the right.

The diagram shows the projected average growth rates of global consumer spending by category up to the year 2022. Spending on recreation and culture is forecast to grow at a CAGR² of 2.1%, which is a higher growth rate than the one for alcohol, and tobacco. Spending on education is forecast to have the highest growth, at a CAGR² of 5.3%.

While education and health are mostly born out of actual and perceived necessity, the growth in spending on recreation and culture indicates the willingness of consumers worldwide to spend more on leisure and cultural immersion.

Global¹ consumer spending CAGR² 2017-2022



1: Only countries listed in the Consumer Market Outlook 2: CAGR: Compound Annual Growth Rate / average growth rate per year; nominal growth (= not adjusted for inflation) 3: Personal care, prostitution, personal effects, social protection, insurance, financial services, other services

4: Services for routine household maintenance are also included

Source: [Statista Consumer Market Outlook 2019](#), [Statista Digital Market Outlook 2019](#), United Nations 2000

CONSUMER INSIGHTS



The toy market is going digital

Consumer insights: summary

In this chapter, we will focus on a case study of the traditional toys market in the United States. More data about other hobby products and regions are available in [Global Consumer Survey](#).

There is nothing sweeter than a child's laugh and parents are willing to go far to make their children happy, especially when it comes to spending. The toy industry is booming. Revenue in the Toys & Games segment amounts to more than US\$32bn in 2018 in the United States only and puts the country right in the lead when it comes to toy purchases.

A trip to a toy store can be like a mini vacation for kids. However, chains like *Toys R Us*, known for their enormous retail stores, are closing due to the take-over of eCommerce and its comfortable online shops.

Digitalization does not only strike when it comes to purchase channels, but it also influences the importance of toy categories. Electronic devices have become highly popular among children and parents. The children wish to follow the latest trends and urge their parents to purchase the newest app to play with. Parents wish to encourage child development and education even during play time and go for expensive STEM¹-toys.

Discover now the true drivers behind toy purchases, find out about the relevance of different toy categories such as card and board games, and read about the role of age appropriateness and toy purchase situations in general.

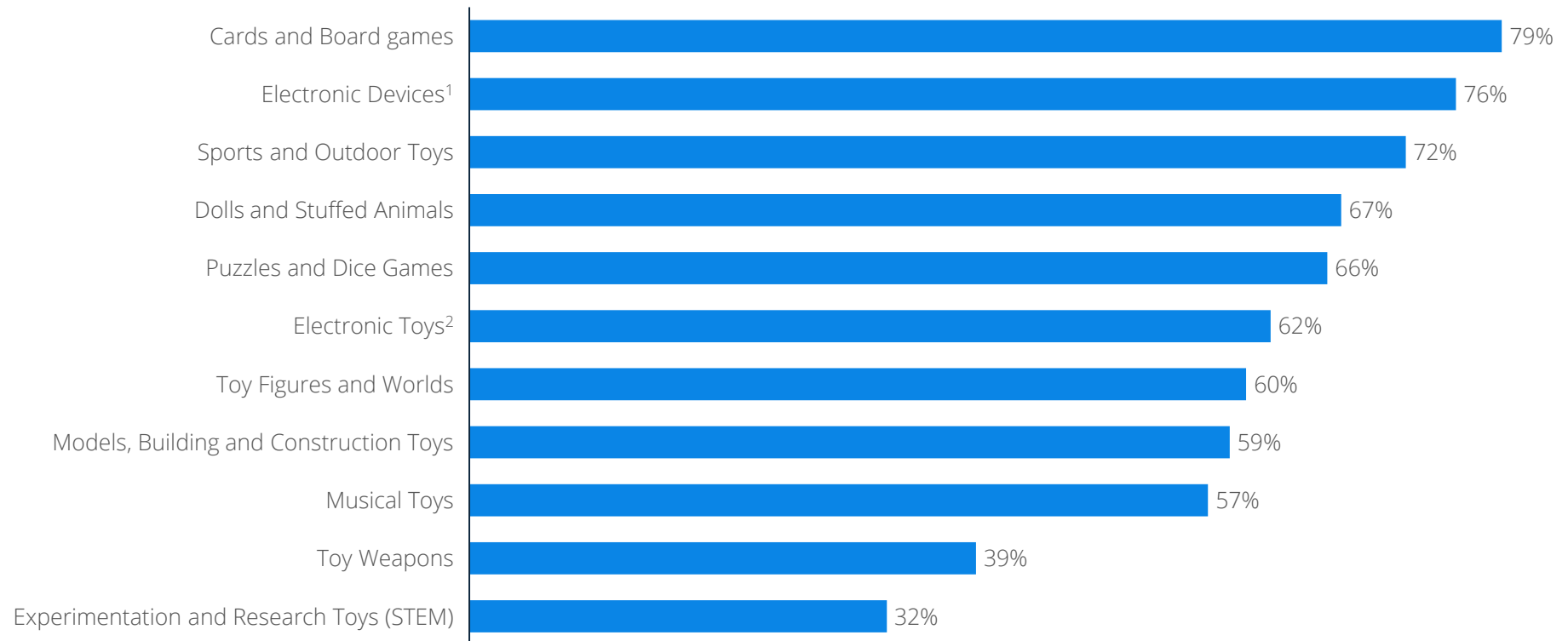


Cards and Board Games can be found in 4 out of 5 households with children

Consumer insights: availability of toys and games



Availability of Toy categories in household



1: electronic devices include games consoles, smartphones, tablets, stereo equipment, etc. 2: electronic toys include radio devices, electronic pets, etc.

"What toys are available for your children to play with in your household?"; Multi Pick; n=2,039

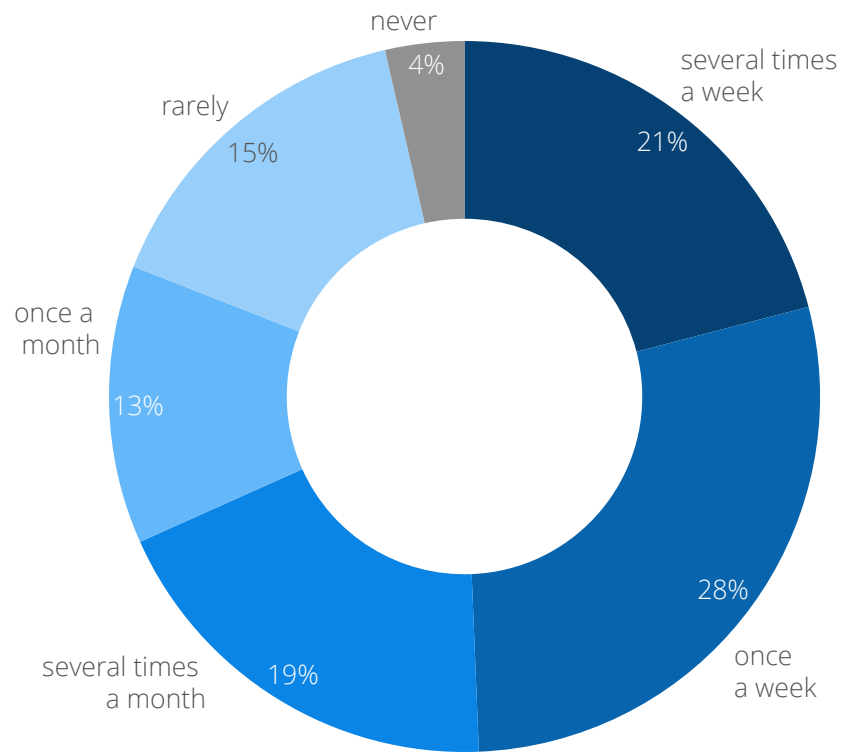
Source: [Statista Global Consumer Survey - Content Special: Toys and Games in the U.S.](#)

Half of families play Board Games at least once a week, most don't require a particular occasion to play

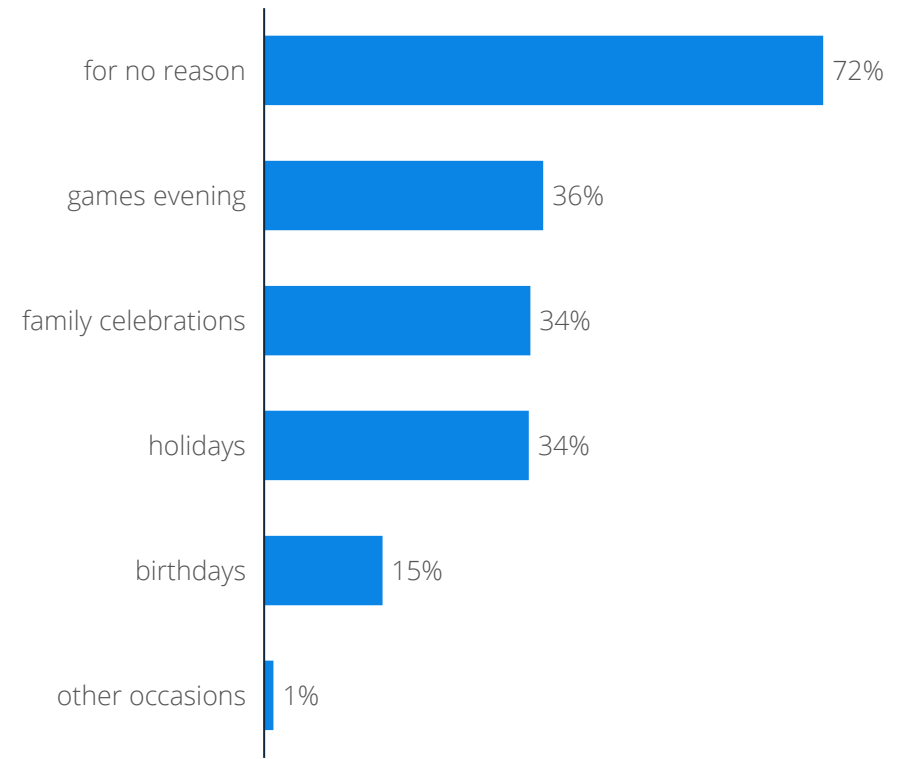
Consumer insights: Cards & Board Games



Frequency of playing Board Games



Occasions for playing Board Games

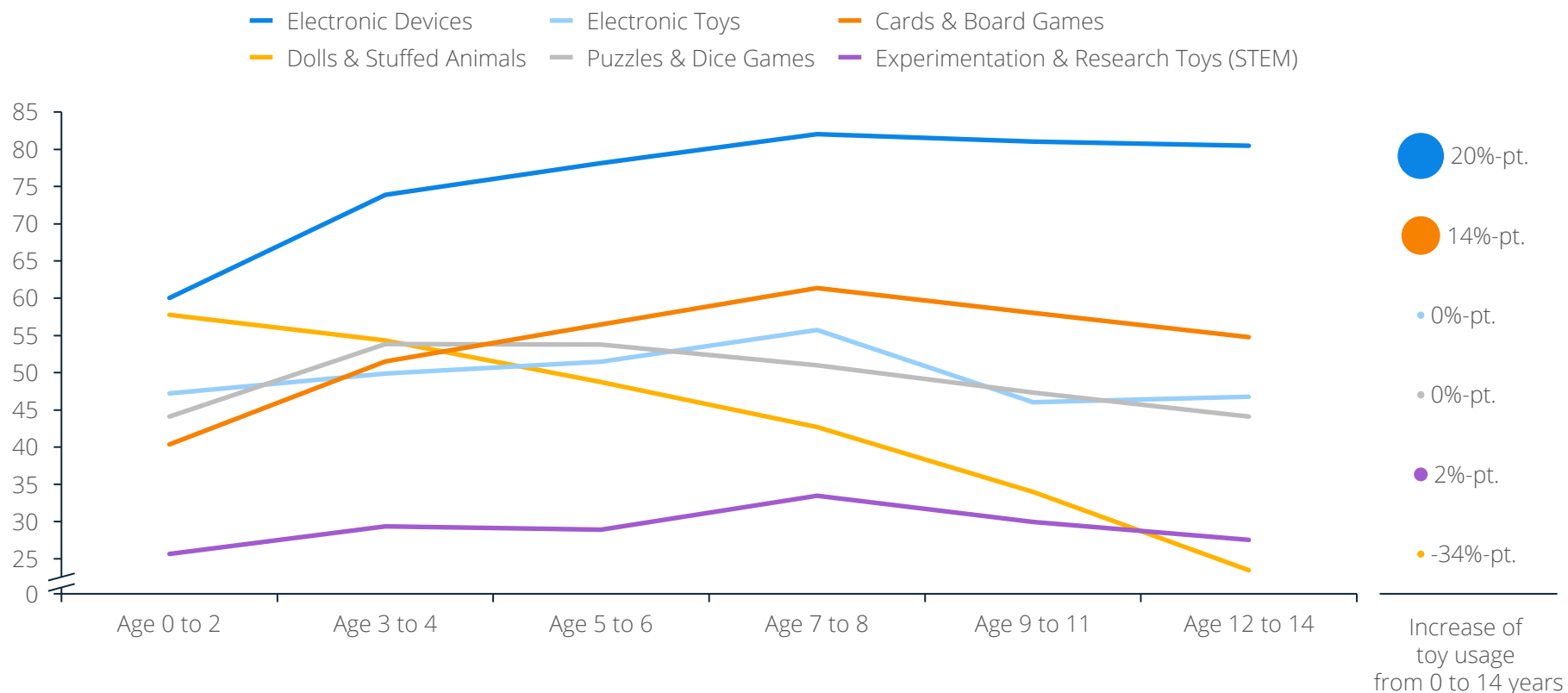


Electronic devices are children's number-one toy regardless of their age

Consumer insights: electronic devices (1/2)



Usage¹ of toy categories in %



1: percentages of usage independently from ownership

"What does your 0 to 2 / 3 to 4 / 5 to 6 / 7 to 8 / 9 to 11 / 12 to 14-year-old child currently play with at home?"; Multi Pick; n=2,039 (age 0 to 2, n=483; age 3 to 4, n=429; age 5 to 6, n=439; age 7 to 8, n=445; age 9 to 11, n=691; age 12 to 14, n=712)

Source: [Statista Global Consumer Survey - Content Special: Toys and Games in the U.S.](#)

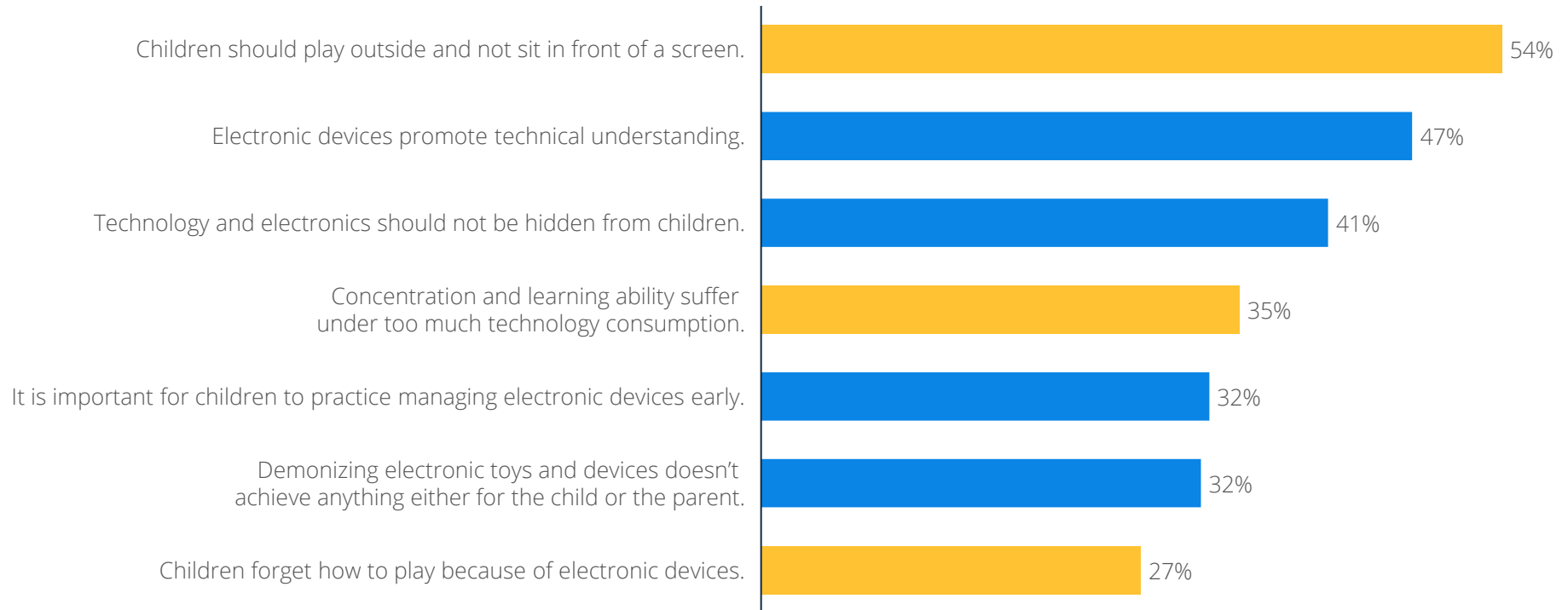
Playing outside vs. gaining technical understanding: Attitudes towards electronics are diverse

Consumer insights: electronic devices (2/2)



Share of respondents who favor and reject electronic toys and devices

■ positive about electronics ■ negative about electronics



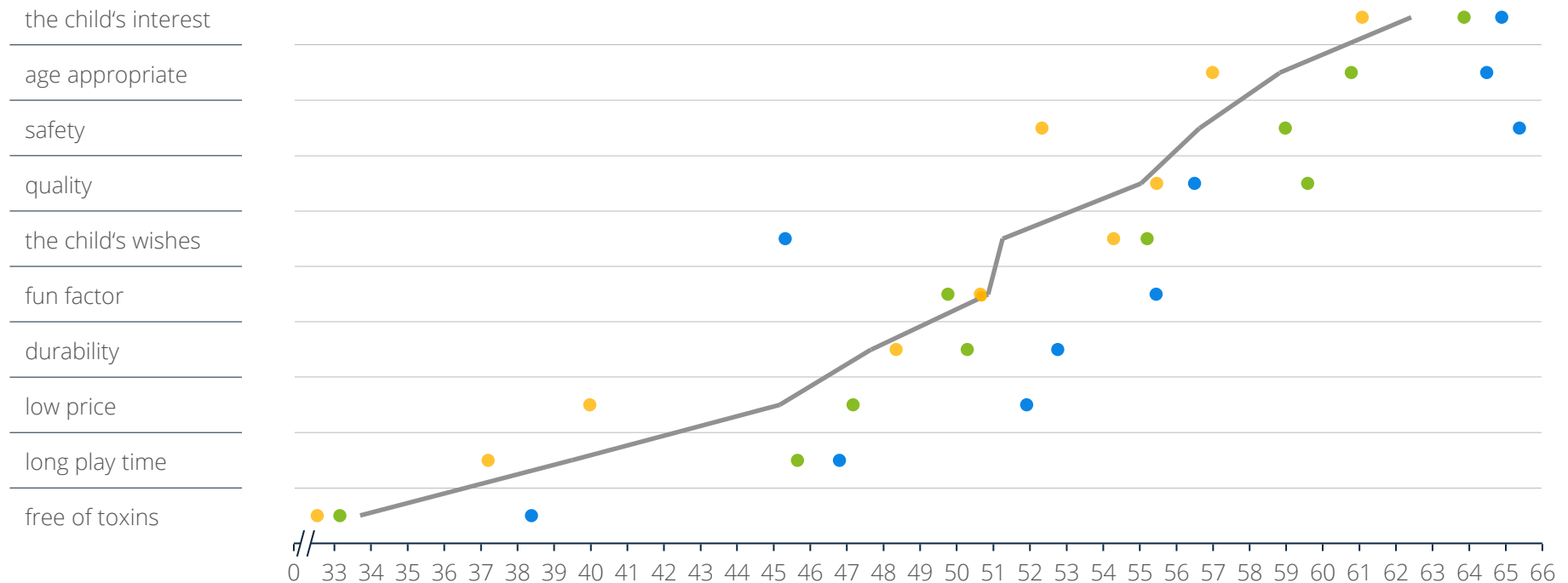
The child's interest is decisive in the choice of a toy, followed by age adequacy

Consumer insights: purchase preferences (1/2)



Top 10 purchase criteria in %

— Total ● child up to 4 years old ● child between 5 and 8 years old ● child between 9 and 14 years old

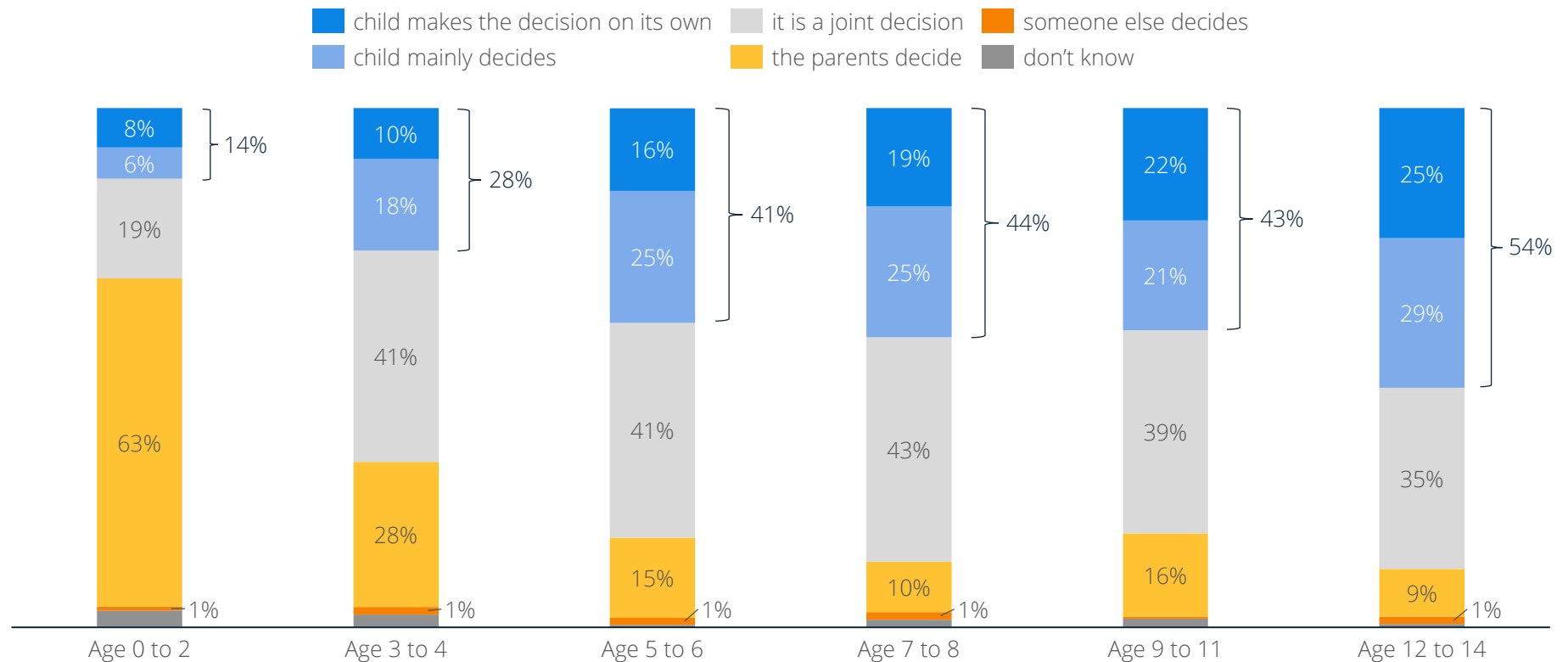


2 out of 5 children older than 5 years decide (mainly) on their own about toys

Consumer insights: purchase preferences (2/2)



Share of parents'/children's influence on choosing toys

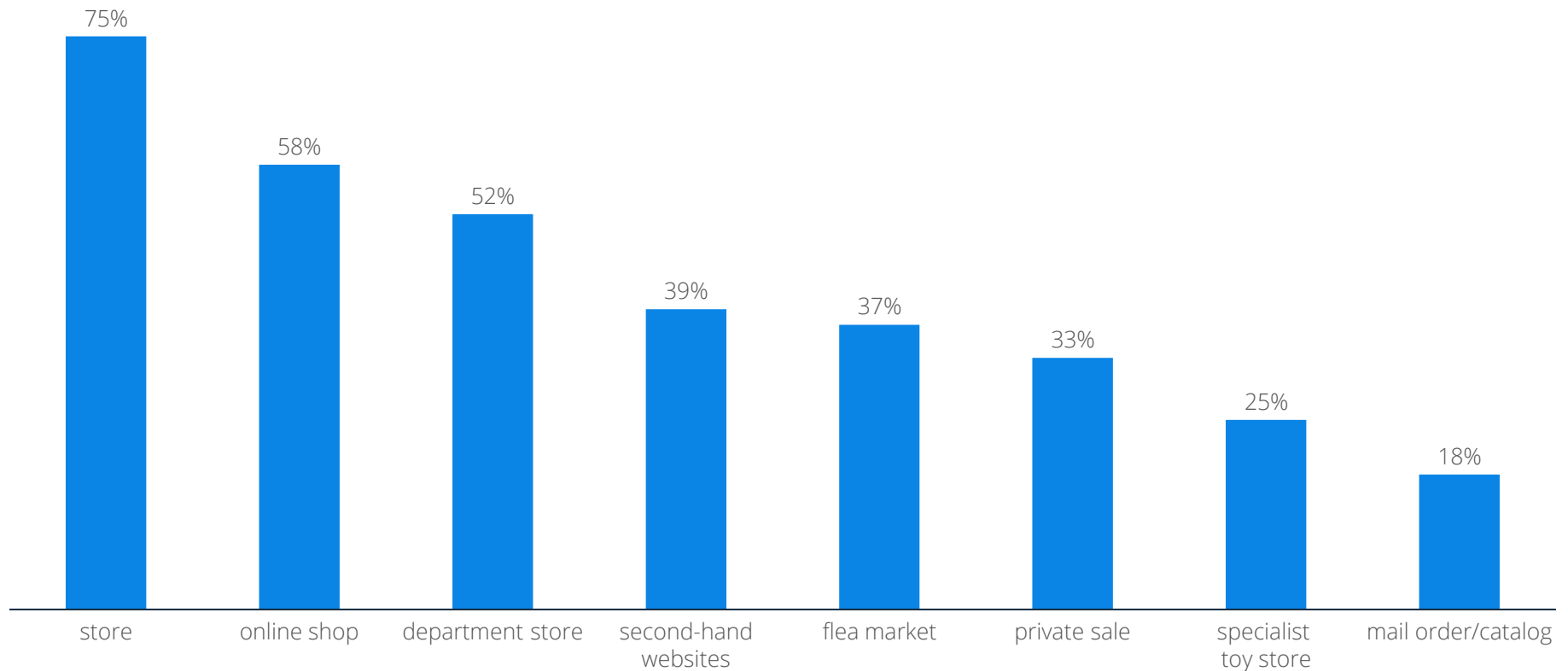


Stores are not (yet) challenged by online shops as the number one place to buy toys

Consumer insights: sales channels (1/2)



Channels for toy purchases

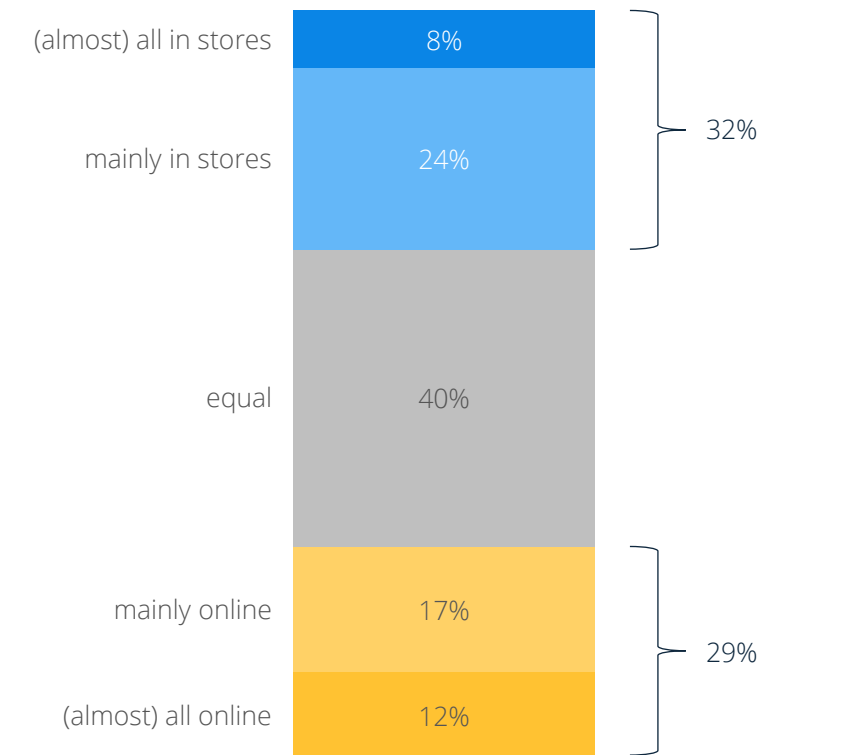


Offline shopping is driven by the child's involvement in the decisions, while parents favor online for its ease

Consumer insights: sales channels (2/2)



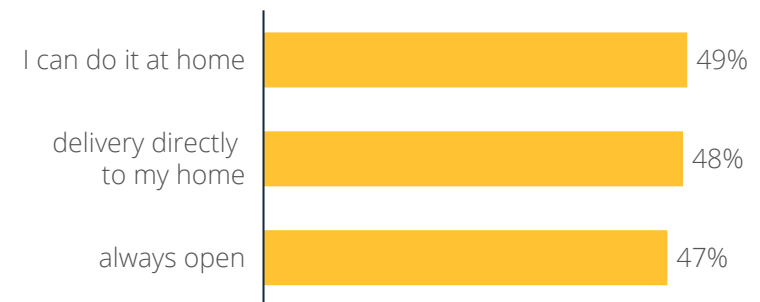
Offline/online shopping preferences



Top 3 reasons to buy toys in a store



Top 3 reasons to buy toys online
























KEY PLAYERS



With more than US\$5.6bn, LEGO leads the Toys and games market

Key players: representative companies and their brands

Company				
Sales 2018	US\$5.6bn	US\$4.5bn	US\$3.2bn	US\$2.6bn ¹
Key brands	   	    	    	  



LEGO is one of the major toy companies, with a revenue of US\$5.6bn in 2018

Key players: LEGO



The Lego Group is one of the biggest producer, marketer and seller of play materials. The Danish company operates globally in more than 130 countries. LEGO's toys are designed to encourage development and learning through play, imagination and creativity, and, for the true fans, LEGO Ideas platform lets people share their creations and vote on which of those should become official construction sets. The company diversifies its portfolio by also producing video games, with close to 70 titles published so far, as well as feature films and other video content.

LEGO celebrated 40 years of their minifigures in 2018

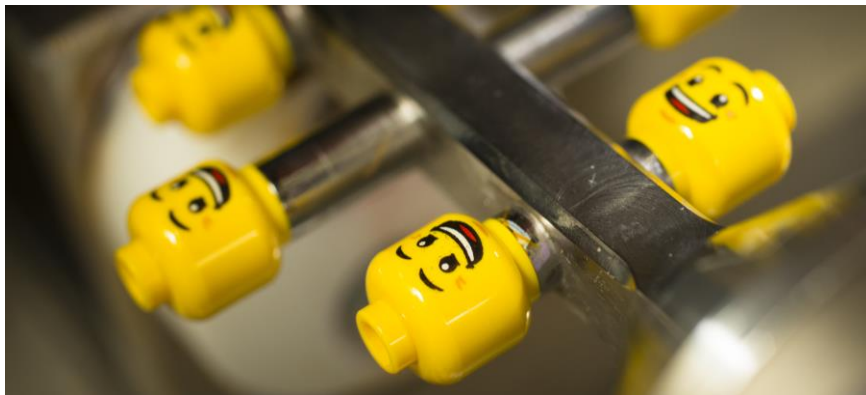
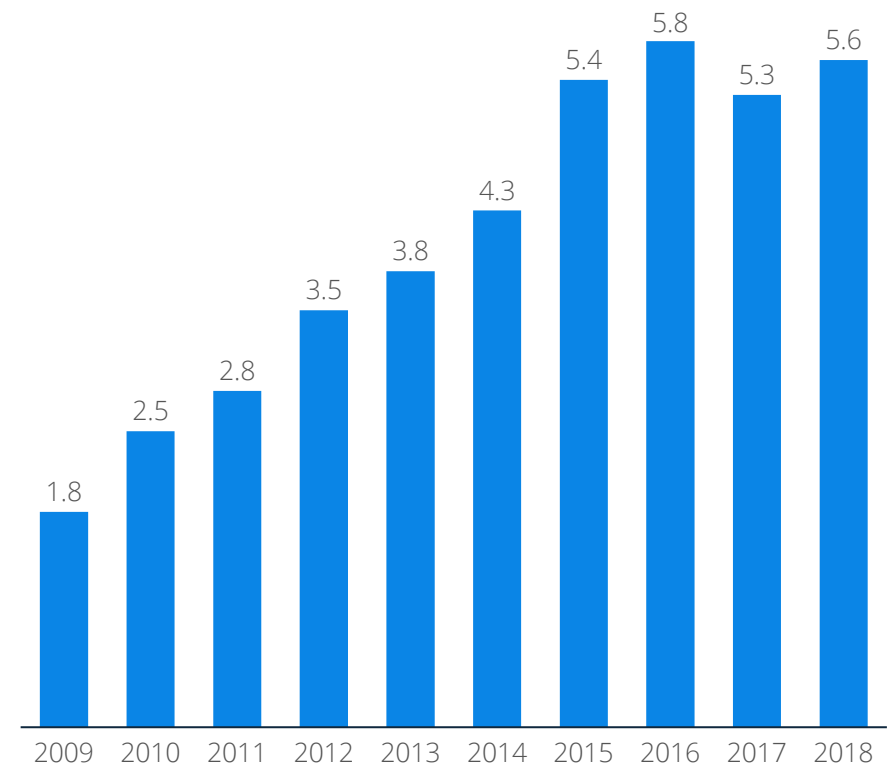


Photo: Production: minifigure faces, LEGO press release 2018

LEGO revenue¹ worldwide in billion US\$



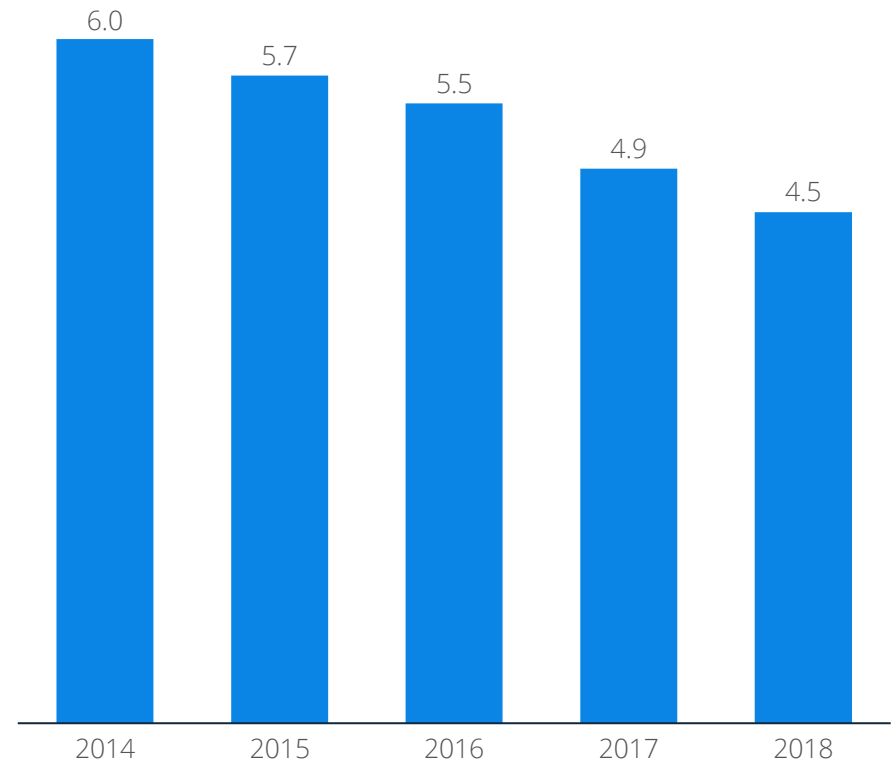
Mattel is one of the leading companies for toy products in the United States

Key players: Mattel

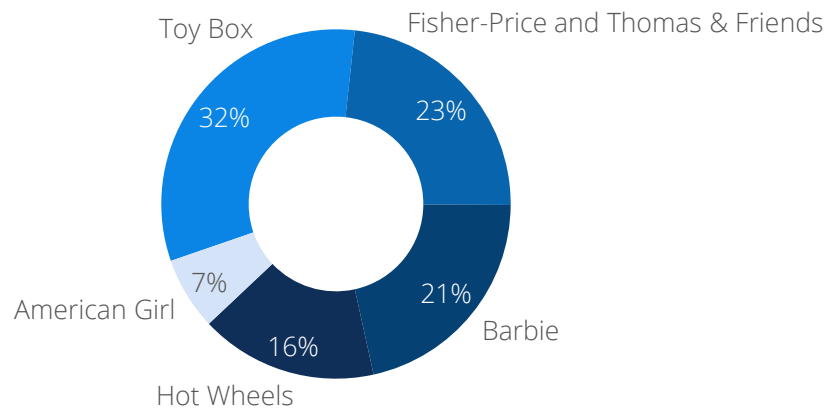


Mattel Inc. is one of the leading toys and games companies worldwide with operations in more than 50 countries. The company offers a wide variety of toys including categories like dolls, vehicles, baby & early childhood, innovation & technology, as well as crafts, construction and outdoor. Mattel's top brands include American Girl, Barbie, Fisher-Price, Hot Wheels, Thomas & Friends, Matchbox and Jurassic World. In 2018, Mattel made approximately US\$1,089m in revenue with its Barbie brand and more than US\$1,185m with its Fisher-Price and Thomas & Friends brand.

Mattel net sales worldwide in billion US\$



Sales share in 2018



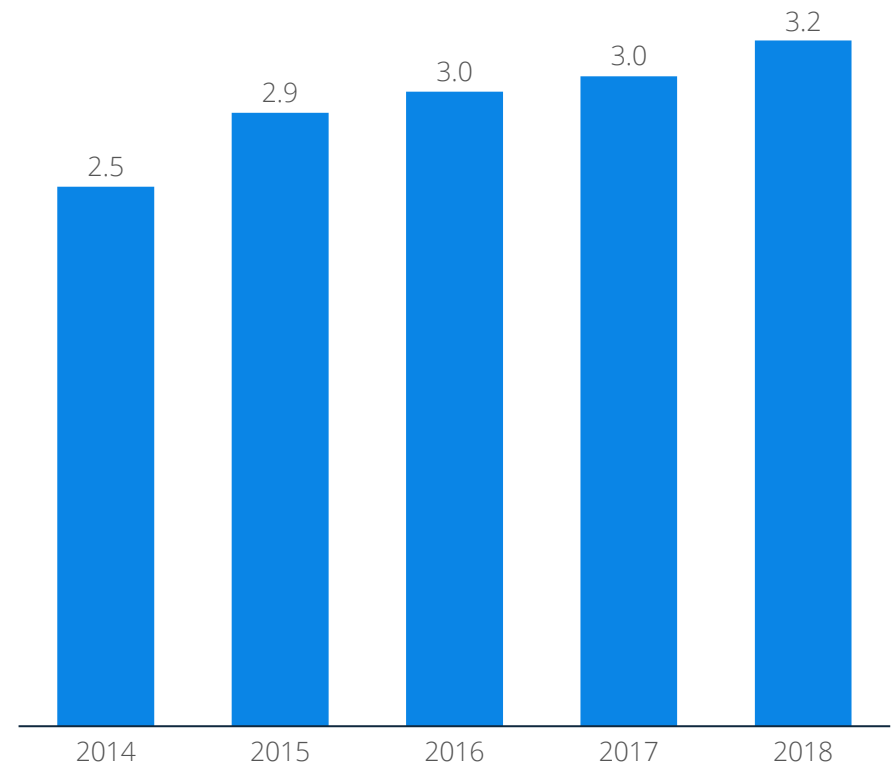
Sporting goods company Amer Sports continues to grow in 2018

Key players: Amer Sports

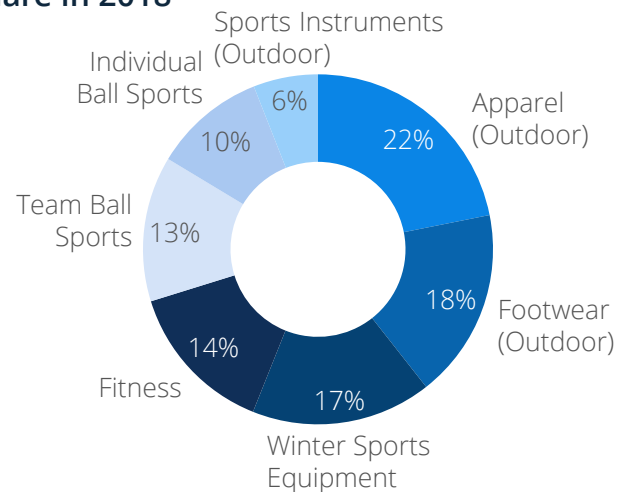


Amer Sports is a Finnish sporting good company operating in 34 countries worldwide. The top selling brands are Salomon, Arc'teryx, Peak Performance, Atomic, Mavic, Suunto, Wilson and Precor. Most of the company's revenue is generated in the EMEA region (€1,163m), followed by the Americas (€1,124m) in 2018. Amer sports' strategy for 2019 is to focus on the apparel and footwear business units, directly selling to customers and further develop the markets in China and the United States.

Amer Sports revenue¹ worldwide in billion US\$



Sales share in 2018



1: Constant exchange rate 1US\$ = 0.88562EUR
Sources: Amer Sports

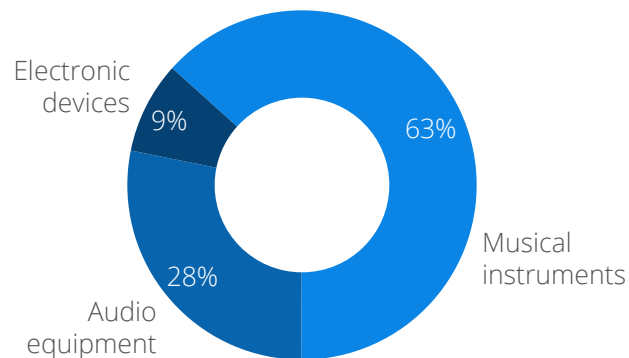
In 2018, musical instruments accounted for 63% of Yamaha's sales

Key players: Yamaha

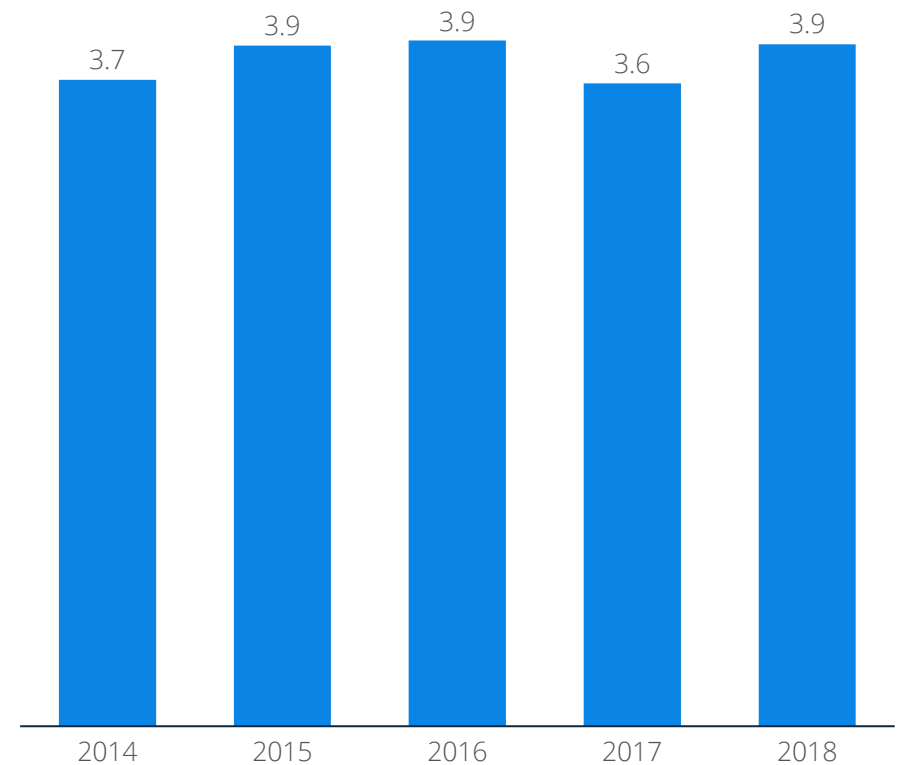


The Yamaha Corporation is a highly innovative company which core competencies are (acoustic) musical instruments, digital instruments, audio equipment, sound systems and electronic technologies. Besides the Yamaha brand, the company further owns the brands Bösendorfer, Steinberg, Line6 and NEXO. According to Yamaha's estimates, the company's global market share for musical instruments reached 24% in 2017. One strength of the company is its innovative strategy: developing sound systems for vehicles and connected cars or pianos connected to an audio system to transmit sounds in the entire house.

Sales share in 2018¹



Yamaha revenue^{1,2} worldwide in billion US\$



TRENDS



STEM toys aim to teach kids tech and math skills in an amusing way

Trends: STEM toys

STEM is an acronym that stands for Science, Technology, Engineering and Math, but, to be more precise, STEM toys usually have a strong connection to robotics, coding and generally making things. The idea behind them is development of technical skills in children by enabling play with DIY computers, circuit sets, electrical motors or programmable robots in a safe way. However, the biggest question when it comes to toys is always “are they fun to play?”

As with any other toy, parents should choose ones with an angle their child already enjoys and ones that are age appropriate. Many of STEM toys might provide a genuine challenge to assemble and operate and giving children toys that do not match their interest can have an opposite effect: making them disinterested in the world of STEM all together. However, when chosen correctly, these toys are aimed to improve children's cognitive skills and inspire them to pursue careers in STEM field in the future.

Many parents recognize the benefits of STEM toys for their children and many toy companies adapted their product lines in order to respond to the increase in demand. In January 2017, Amazon launched “Amazon STEM toy club” a subscription program that provides children with new STEM products on a regular bases. LEGO, one of the oldest STEM toys companies, constantly innovates and adds modern features to their products. Which toys and companies will win the title of a market leader is still unclear, but the STEM Toys are definitely here to stay.



Photo: Fisher Price 2016



Photo: LEGO 2017

STEM toys can be enjoyed from an early age on. One such toy is the Code-a-pillar by Fisher Price, that is aimed to help kids, age 3 to 6, to develop skills like sequencing, critical thinking, reasoning, discovery, memory, problem solving and experimentation. How does it work? Children arrange toy's segments in order to program its path and sounds it makes.

LEGO's BOOST Creative Toolbox is made for children, age 7 to 12, who want to build and program their own robot made out of LEGO parts. For example, Vernie the Robot can be set to dance, beatbox or play a game, however the most interesting feature is that different parts can be reassembled into different robots with different functionalities, all controlled in the LEGO® BOOST App.

Virtual and augmented reality can be gamechangers in the videogames industry

Trends: virtual and Augmented Reality

Virtual Reality (VR) and Augmented Reality (AR) are among the dominant trends in the industry and are expected to have a major impact on the videogames market. PlayStation already offers their own headset, PlayStationVR, with an impressive number of games and interactive movies exclusive to the console, while Nintendo plans to add a VR Kit to its Labo line, advertised as a “unique first VR experience”. That said, the most interesting products are expected to come from the newcomers to the videogames market – Facebook, Google and Apple.

VR and AR also offer possibilities to develop ecosystems further and fuel market growth. Virtual Reality could become the next key application. Similar to Facebook's VR device Oculus Go, Google is investing heavily in VR. In 2016, Android's version “Nougat”, which includes a VR mode, was introduced together with the VR platform “Daydream”. In 2018, Android 9.0 will be focused on simplicity and speed to continue the improvements in vision and sound for an even better audiovisual experience.

Aside from Virtual Reality, Google is also focusing on Augmented Reality. Google's “Tango” was the first integration of AR technology into a smartphone. In early 2018, Google discontinued the ambitious AR Project “Tango” because it only worked on special smartphones with a special hardware. For the mass market, there was a lack of sufficient hardware manufacturers who wanted to build a Tango smartphone. With “ARCore”, Google has built a technically simpler system which is compatible with a variety of Android devices. ARCore is the equivalent of Apple's ARKit, which already runs on all recent iPhones.



Photo: Facebook press release 2018

Oculus Go is Facebook's stand-alone VR headset. It aims for crystal-clear optics, has embedded the 3D graphics and uses built-in speakers to create a lifelike experience.



Photo: Google press release 2018

With Google's ARCore, developers can create new augmented reality apps that will run on all up-to-date Android phones.



Photo: Apple press release 2018

Apple's ARKit can be used on iPhone and iPad. ARKit runs with a lot of apps that redefine what a videogame is. Using an iPhone, one can visit a virtual museum or learn about planets, human anatomy and machines in 3D.

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TOYS & GAMES



Video Game Consoles and Plastic & Other Toys are an essential part of the Toys & Games segment

Market definition



- The Toys and Games market is constituted by a wide variety of products intended mainly, but not exclusively, for the entertainment of children.
- The market focuses on traditional segments like dolls, construction sets as well as card games.
- Board games are excluded.
- Big brands in this category are Mattel, Lego, Hasbro, MGA Entertainment, etc.

In scope

- Various toys for children and adults
- Cards and other indoor games
- Video games consoles

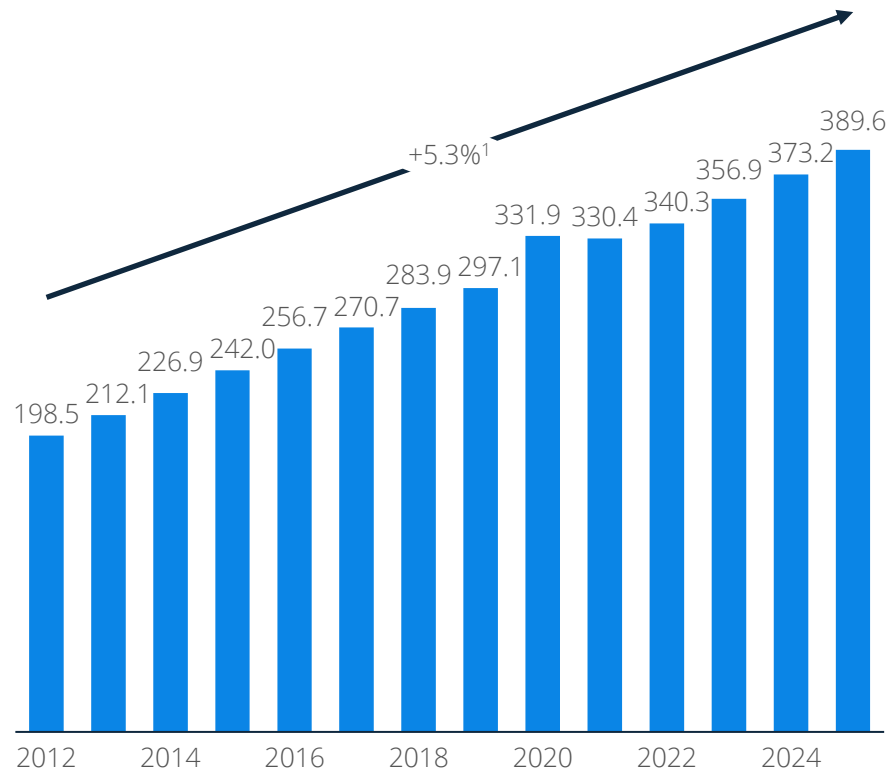
Out of scope

- Board games
- Video games

In 2019, worldwide Toys & Games sales amounted to US\$297.1 billion

Segment overview

Worldwide revenue in billion US\$



Key takeaways

- The worldwide Toys & Games revenue will increase at a CAGR¹ of 5.3% from 2012 to 2025.
- Due to COVID-19, the new 2020 forecast for the Toys & Games segment is 6.8% higher than the original forecast.
- In the Toys & Games segment, Australia (US\$162.6) and Hong Kong (US\$152.5) had the highest annual revenue per capita in 2019.



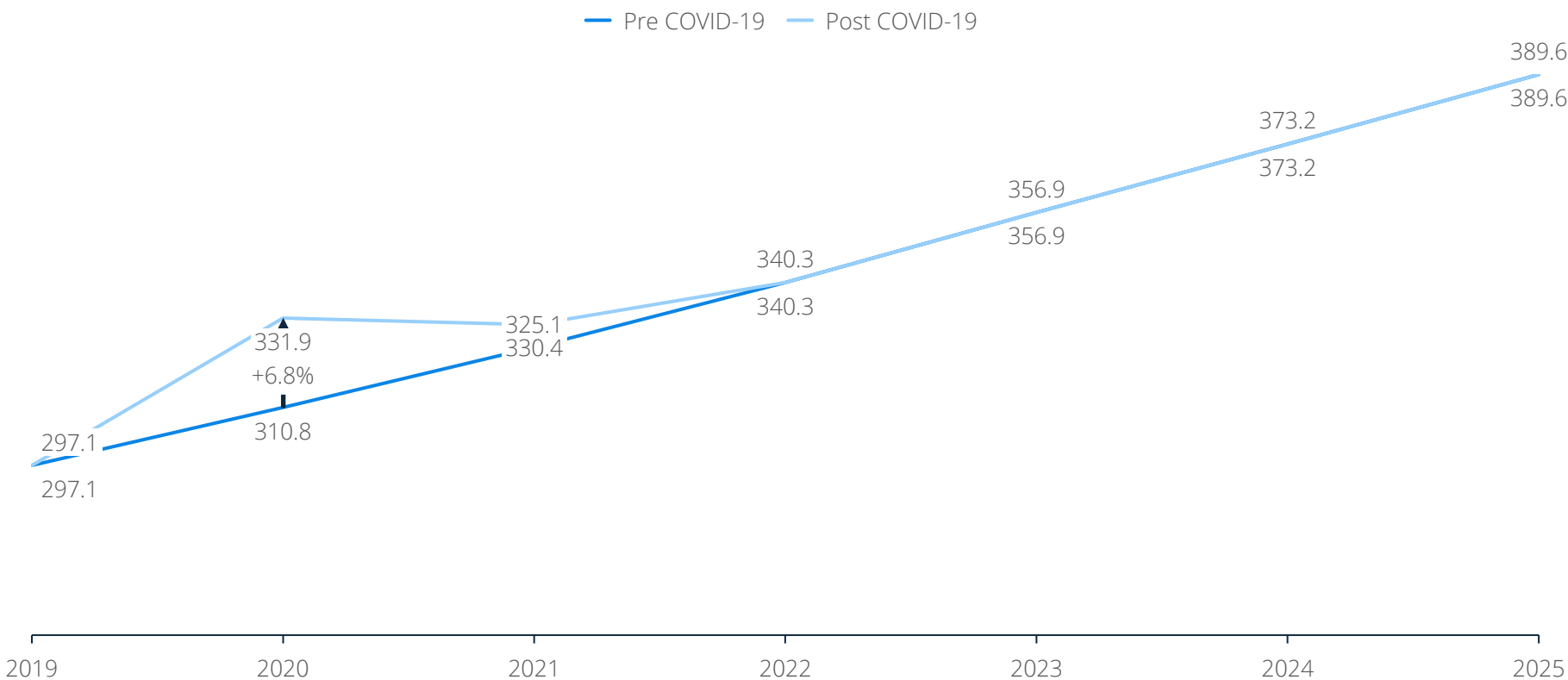
US\$297.1bn
in 2019

+5.3%
CAGR¹ 2012–2025

Due to COVID-19, the 2020 forecast for the Toys & Games segment is 6.8% higher now

COVID-19 impact

Worldwide revenue in billion US\$¹

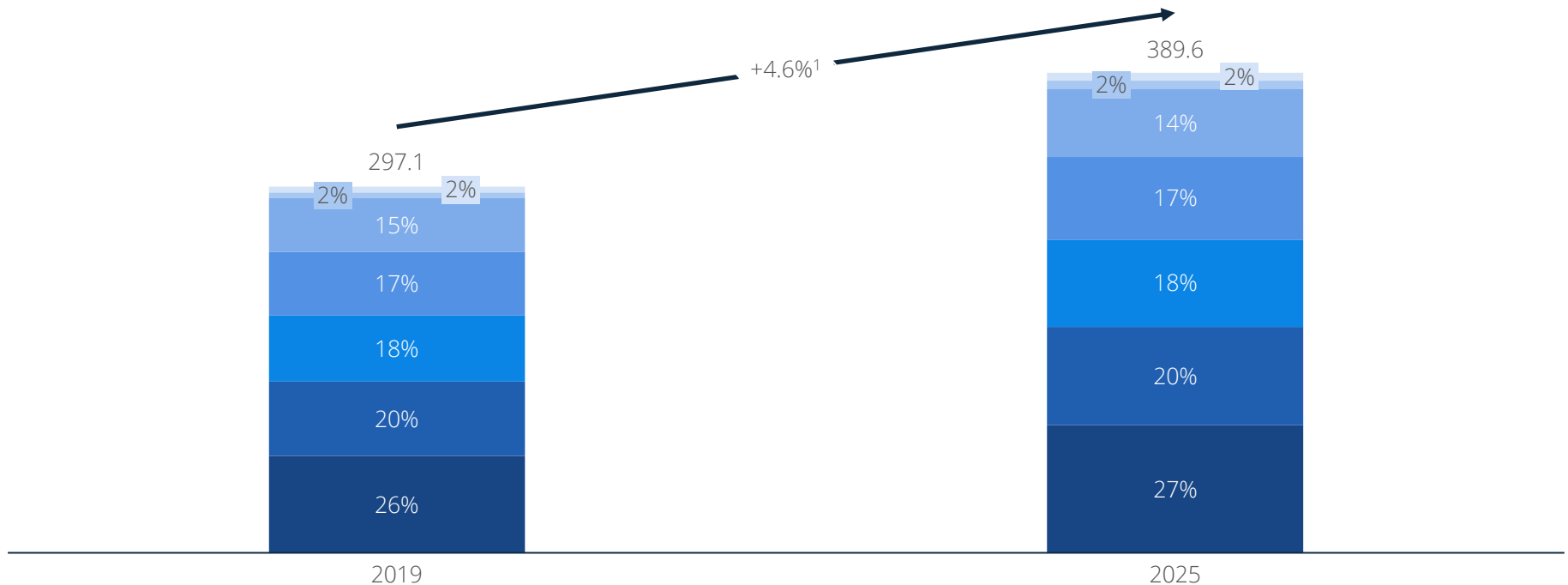


Video Game Consoles generates the highest revenue in the Toys & Games segment

Revenue share by subsegment

Worldwide revenue in billion US\$

Video Game Consoles Toys for Toddlers & Kids Dolls & Stuffed Toys Puzzles
Plastic & Other Toys Construction Sets & Models Card Games

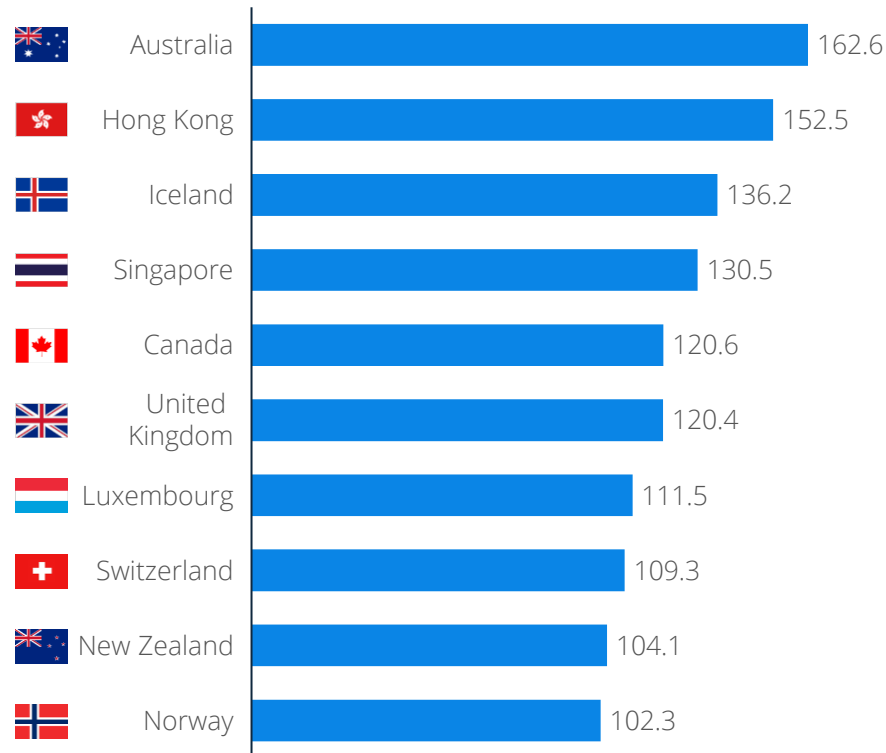


1: CAGR: Compound Annual Growth Rate / average growth rate per year
Sources: [Statista Consumer Market Outlook 2020](#)

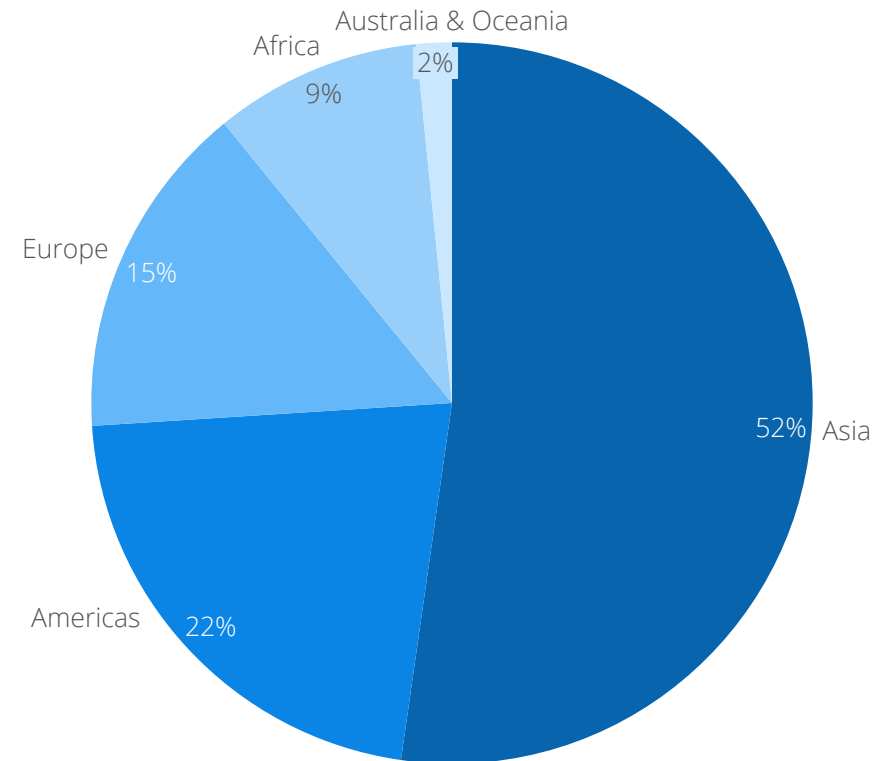
In 2019, Australians and people of Hong Kong spent the most on Toys & Games

Worldwide comparison

Revenue per capita ranking in US\$ in 2019



Revenue share in 2019



Toys & Games sales in Europe will increase at a CAGR¹ of 3.0% from 2012 to 2025

KPI comparison – Europe (1/2)

Revenue in billion US\$

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR ¹
Toys & Hobby total	57.0	59.5	62.2	64.7	67.0	68.9	70.6	72.2	75.1	75.0	76.3	78.2	80.0	81.6	2.8%
Toys & Games	35.0	36.6	38.5	40.3	41.9	43.4	44.6	45.6	49.7	48.2	48.4	49.5	50.6	51.6	3.0%
Share of total market (in %)	61.4	61.5	61.8	62.2	62.6	63.0	63.1	63.2	66.2	64.3	63.4	63.3	63.2	63.2	0.2%

Revenue per capita in US\$

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR ¹
Toys & Hobby total	68.8	71.6	74.6	77.3	79.8	81.8	83.6	85.3	88.5	88.4	89.9	92.1	94.2	96.2	2.6%
Toys & Games	42.2	44.1	46.1	48.1	50.0	51.5	52.8	53.9	58.6	56.8	57.0	58.3	59.5	60.8	2.9%

1: CAGR: Compound Annual Growth Rate / average growth rate per year from 2012 to 2025

Sources: [Statista Consumer Market Outlook](#) 2020

In Europe, the UK was the country with the highest revenue in the Toys & Games segment

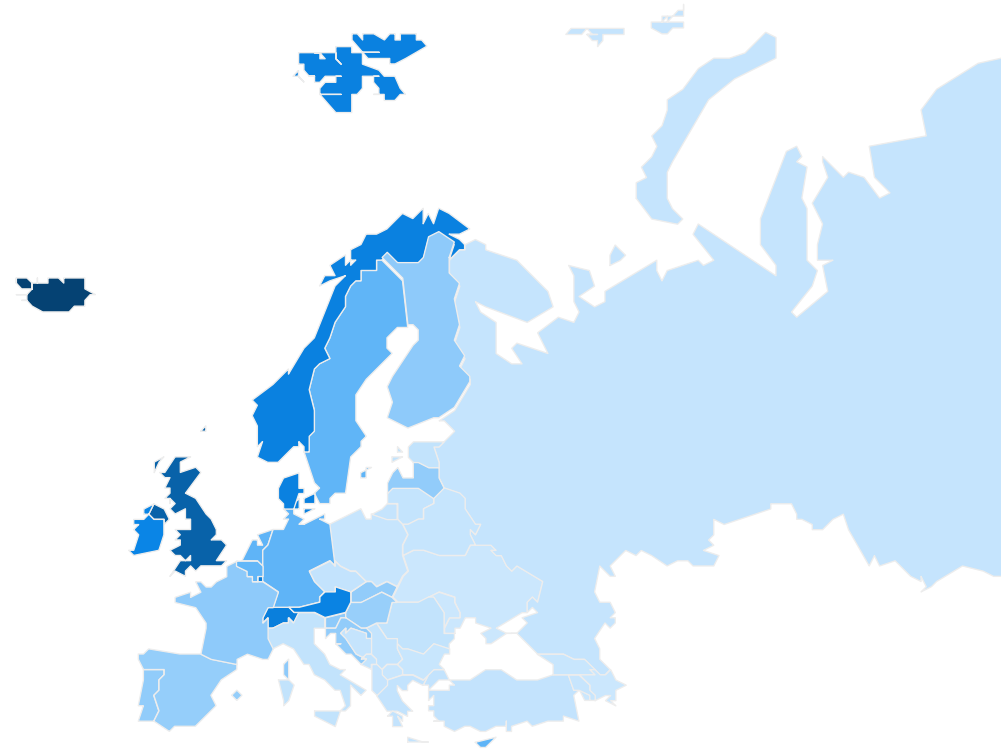
KPI comparison – Europe (2/2)

Revenue ranking in billion US\$ in 2019

United Kingdom		8.1
Germany		6.1
Russia		4.8
France		4.2
Turkey		3.1

Revenue per capita ranking in US\$ in 2019

US\$20     US\$136  Out of scope



Toys & Games sales in the Americas will increase at a CAGR¹ of 3.2% from 2012 to 2025

KPI comparison – Americas (1/2)

Revenue in billion US\$

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR ¹
Toys & Hobby total	77.2	80.5	84.1	87.7	91.0	94.0	96.8	99.6	104.8	105.2	107.8	111.5	115.0	118.5	3.4%
Toys & Games	51.0	53.0	55.3	57.6	59.8	61.7	63.4	65.1	71.2	69.7	70.5	72.6	74.7	76.8	3.2%
Share of total market (in %)	66.1	65.8	65.7	65.7	65.7	65.6	65.5	65.3	68.0	66.2	65.4	65.1	65.0	64.8	-0.1%

Revenue per capita in US\$

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR ¹
Toys & Hobby total	83.9	86.7	89.7	92.7	95.2	97.5	99.5	101.5	105.9	105.5	107.2	110.2	112.9	115.5	2.5%
Toys & Games	55.4	57.1	59.0	60.9	62.6	64.0	65.2	66.3	72.0	69.8	70.1	71.8	73.3	74.9	2.3%

1: CAGR: Compound Annual Growth Rate / average growth rate per year from 2012 to 2025

Sources: [Statista Consumer Market Outlook](#) 2020

In the Americas, the U.S. was the country with the highest revenue in the Toys & Games segment

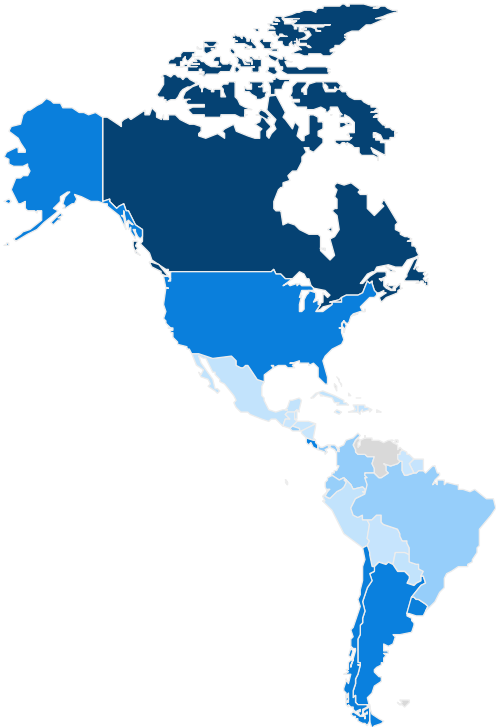
KPI comparison – Americas (2/2)

Revenue ranking in billion US\$ in 2019

United States		32.4
Brazil		9.1
Mexico		4.6
Canada		4.5
Argentina		4.3

Revenue per capita ranking in US\$ in 2019

US\$19     US\$121  Out of scope



Toys & Games sales in Asia will increase at a CAGR¹ of 6.5% from 2012 to 2025

KPI comparison – Asia (1/2)

Revenue in billion US\$

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR ¹
Toys & Hobby total	142.2	154.7	168.0	181.5	194.7	207.5	220.1	232.9	252.6	259.3	271.6	287.3	302.7	318.1	6.4%
Toys & Games	93.3	101.6	110.5	119.7	128.5	137.2	145.5	153.9	173.9	174.8	181.7	192.1	202.4	212.8	6.5%
Share of total market (in %)	65.6	65.7	65.8	65.9	66.0	66.1	66.1	66.1	68.9	67.4	66.9	66.9	66.9	66.9	0.1%

Revenue per capita in US\$

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR ¹
Toys & Hobby total	34.7	37.3	40.1	42.9	45.6	48.2	50.6	53.1	57.1	58.2	60.5	63.5	66.5	69.4	5.5%
Toys & Games	22.7	24.5	26.4	28.3	30.1	31.8	33.5	35.1	39.3	39.2	40.5	42.5	44.4	46.4	5.6%






1: CAGR: Compound Annual Growth Rate / average growth rate per year from 2012 to 2025

Sources: [Statista Consumer Market Outlook](#) 2020

In Asia, China was the country with the highest revenue in the Toys & Games segment

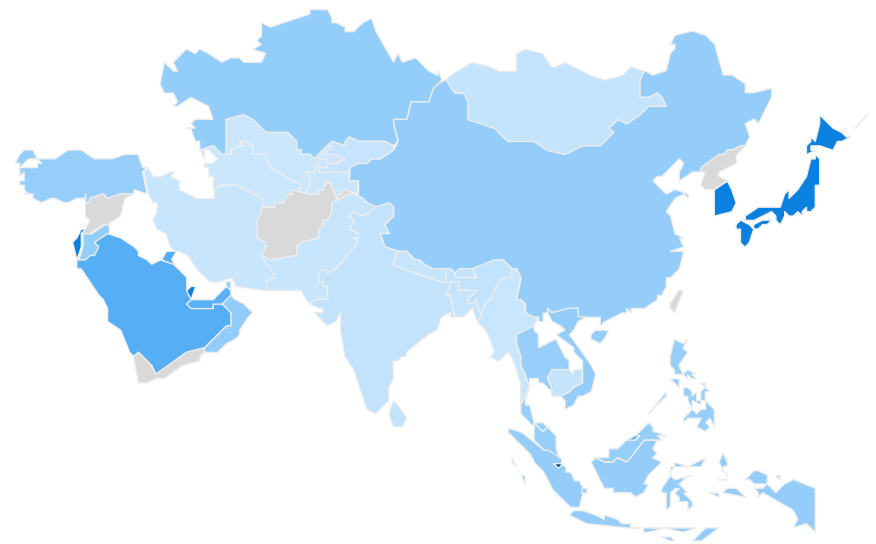
KPI comparison – Asia (2/2)

Revenue ranking in billion US\$ in 2019

China		61.1
India		36.0
Japan		12.4
Indonesia		10.9
South Korea		4.9

Revenue per capita ranking in US\$ in 2019

US\$7     US\$130  Out of scope



Toys & Games sales in Africa will increase at a CAGR¹ of 8.0% from 2012 to 2025

KPI comparison – Africa (1/2)

Revenue in billion US\$

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR ¹
Toys & Hobby total	23.4	25.4	27.6	30.0	32.4	34.9	37.5	40.2	44.2	46.2	49.2	52.9	56.6	60.3	7.5%
Toys & Games	15.7	17.1	18.7	20.4	22.2	24.0	25.8	27.7	31.8	32.6	34.6	37.3	39.9	42.6	8.0%
Share of total market (in %)	67.0	67.4	67.8	68.1	68.4	68.6	68.8	69.0	71.8	70.6	70.3	70.4	70.5	70.6	0.4%

Revenue per capita in US\$

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR ¹
Toys & Hobby total	24.5	25.9	27.4	29.0	30.6	32.1	33.6	35.2	37.8	38.5	40.0	42.1	44.0	45.8	5.0%
Toys & Games	16.4	17.4	18.6	19.8	20.9	22.0	23.1	24.3	27.1	27.2	28.1	29.7	31.0	32.4	5.4%

1: CAGR: Compound Annual Growth Rate / average growth rate per year from 2012 to 2025

Sources: [Statista Consumer Market Outlook](#) 2020

In Africa, Egypt was the country with the highest revenue in the Toys & Games segment

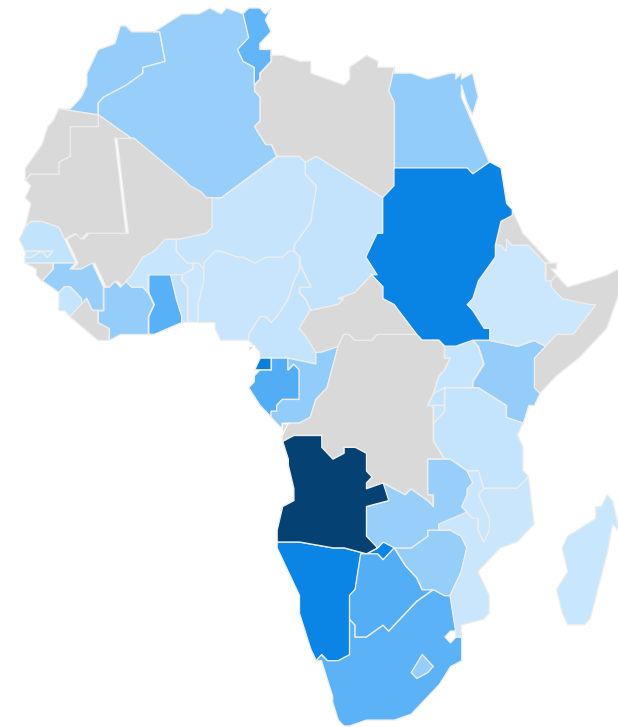
KPI comparison – Africa (2/2)

Revenue ranking in billion US\$ in 2019

Egypt		3.2
Nigeria		2.9
South Africa		2.5
Angola		2.4
Sudan		2.2

Revenue per capita ranking in US\$ in 2019

US\$10     US\$75  Out of scope



Toys & Games sales in Australia & Oceania will increase at a CAGR¹ of 3.9% from 2012 to 2025

KPI comparison – Australia & Oceania (1/2)

Revenue in billion US\$

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR ¹
Toys & Hobby total	5.2	5.5	5.7	6.0	6.3	6.5	6.7	7.0	7.4	7.4	7.5	7.8	8.0	8.3	3.6%
Toys & Games	3.5	3.7	3.8	4.0	4.2	4.4	4.6	4.7	5.3	5.2	5.2	5.4	5.6	5.8	3.9%
Share of total market (in %)	66.4	66.7	67.0	67.3	67.6	67.8	68.0	68.2	71.5	70.0	69.4	69.4	69.4	69.5	0.4%

Revenue per capita in US\$

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR ¹
Toys & Hobby total	146.3	150.6	155.3	160.1	164.4	168.4	171.9	175.3	184.5	181.7	183.3	187.1	190.7	194.2	2.2%
Toys & Games	97.1	100.4	104.0	107.7	111.1	114.2	117.0	119.6	132.0	127.1	127.2	129.9	132.4	135.0	2.6%




1: CAGR: Compound Annual Growth Rate / average growth rate per year from 2012 to 2025

Sources: [Statista Consumer Market Outlook](#) 2020

In Australia & Oceania, Australia was the country with the highest revenue in the Toys & Games segment

KPI comparison – Australia & Oceania (2/2)

Revenue ranking in billion US\$ in 2019

Australia		4.10
New Zealand		0.50
Papua New Guinea		0.11
Fiji		0.04

Revenue per capita ranking in US\$ in 2019

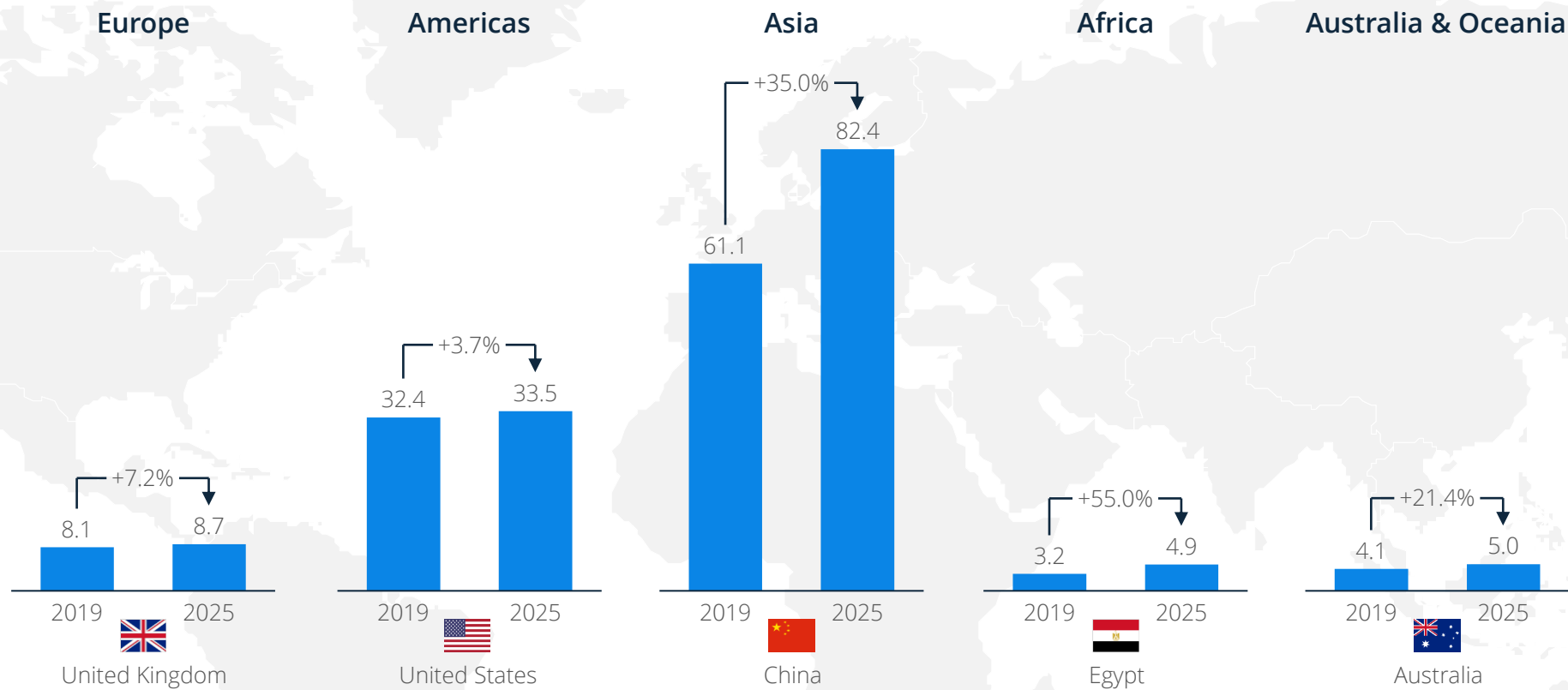
US\$12  US\$163  Out of scope



In Egypt, the Toys & Games segment will grow by 55.0% from 2019 to 2025

Top countries by region

Revenue in the top countries in billion US\$¹



¹: Bar heights may vary due to rounded figures
Sources: [Statista Consumer Market Outlook](#) 2020

SPORTS EQUIPMENT



Summer Sports Equipment are an essential part of the Sports Equipment segment

Market definition



- The Sports Equipment market includes different sports requisites for both outdoor and indoor activities, as well as gym equipment used privately or in athletics halls.
- Sports apparel, footwear and accessories are excluded.

In scope

- Outdoor and indoor sports equipment
- Gym/exercise equipment

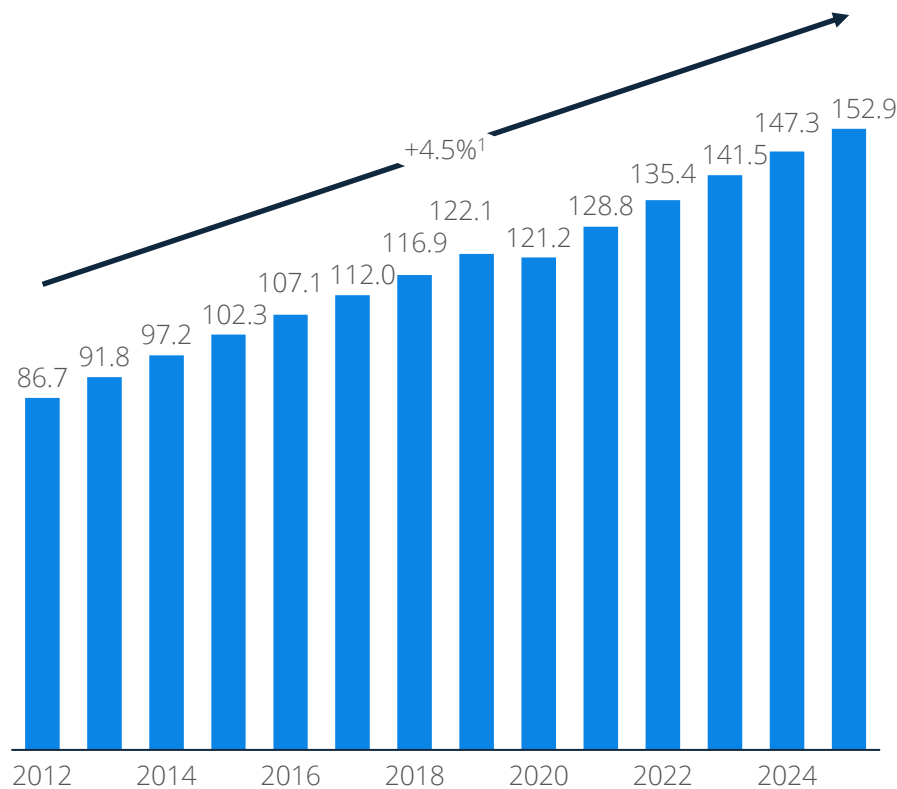
Out of scope

- Sports apparel and footwear

In 2019, worldwide Sports Equipment sales amounted to US\$122.1 billion

Segment overview

Worldwide revenue in billion US\$



Key takeaways

- The worldwide Sports Equipment revenue will increase at a CAGR¹ of 4.5% from 2012 to 2025.
- Due to COVID-19, the new 2020 forecast for the Sports Equipment segment is 4.9% lower than the original forecast.
- In the Sports Equipment segment, Iceland (US\$69.7) and Switzerland (US\$69.0) had the highest annual revenue per capita in 2019.



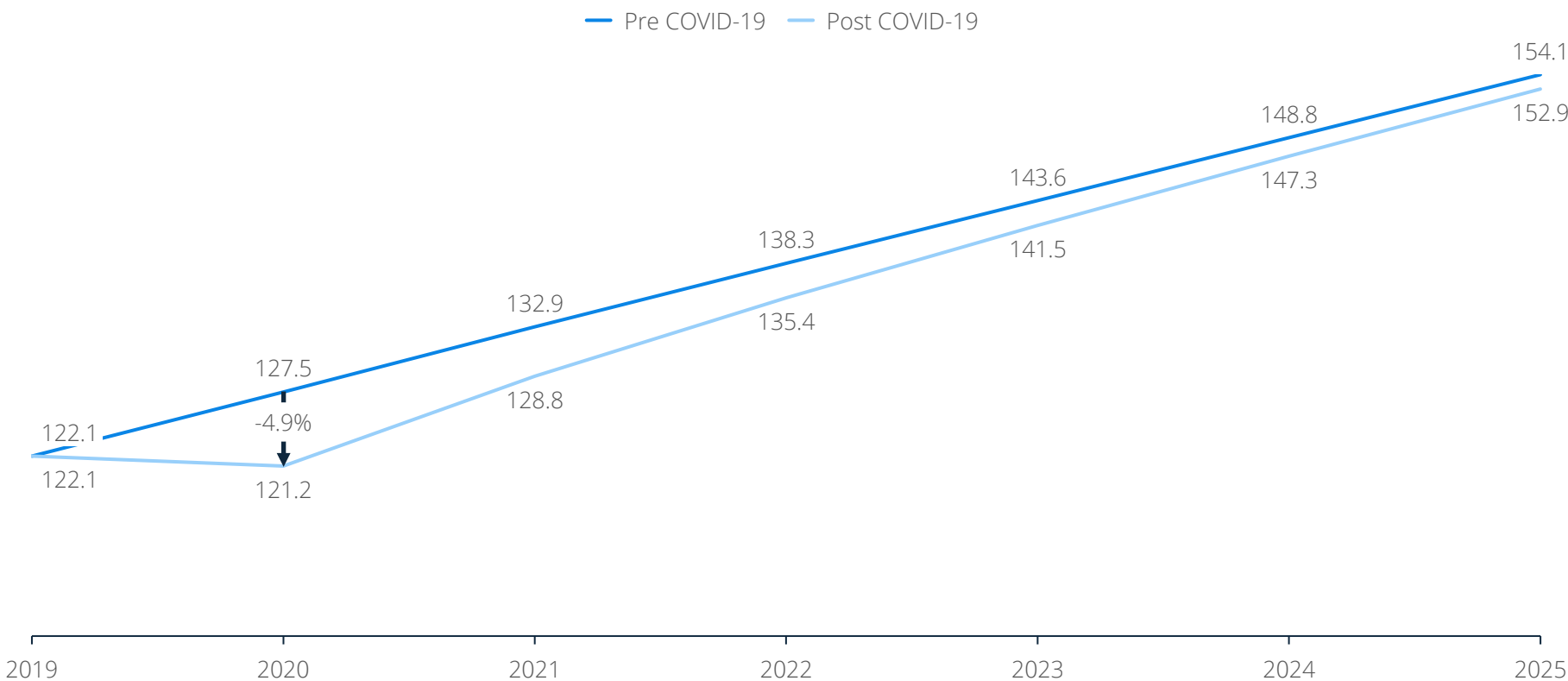
US\$122.1bn
in 2019

+4.5%
CAGR¹ 2012–2025

Due to COVID-19, the 2020 forecast for the Sports Equipment segment is 4.9% lower now

COVID-19 impact

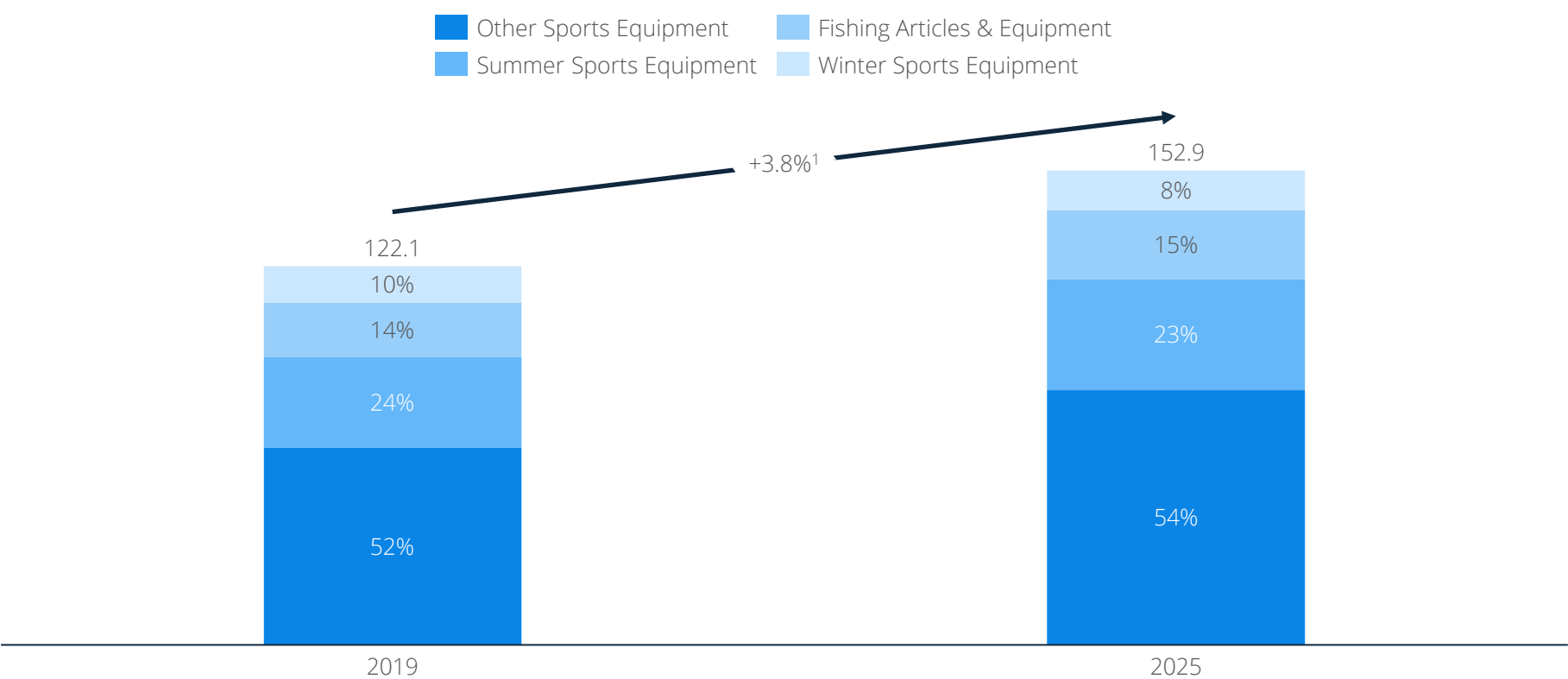
Worldwide revenue in billion US\$¹



Other Sports Equipment generates the highest revenue in the Sports Equipment segment

Revenue share by subsegment

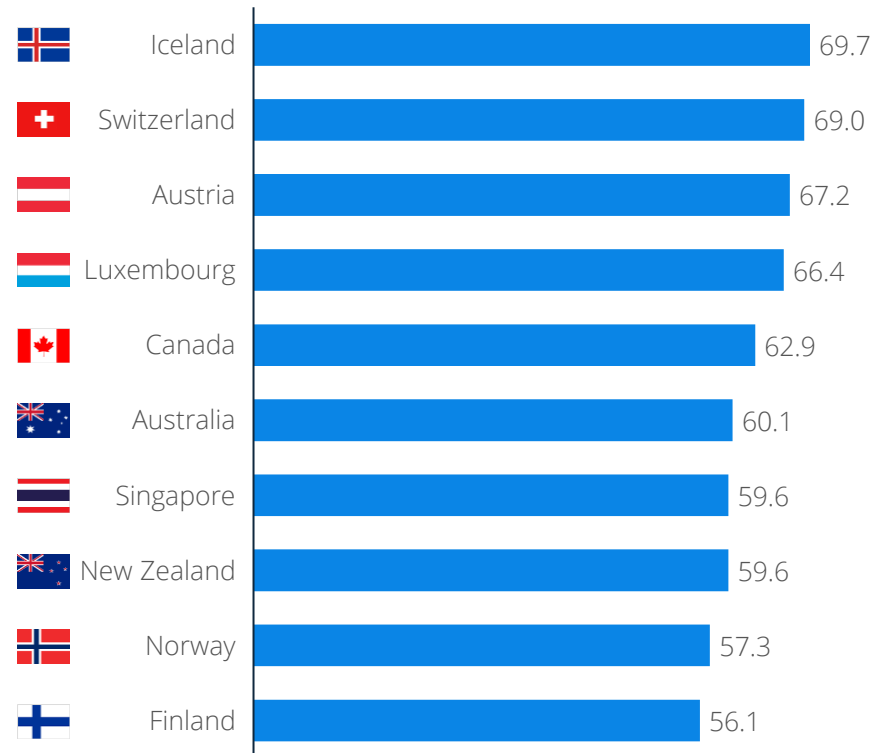
Worldwide revenue in billion US\$



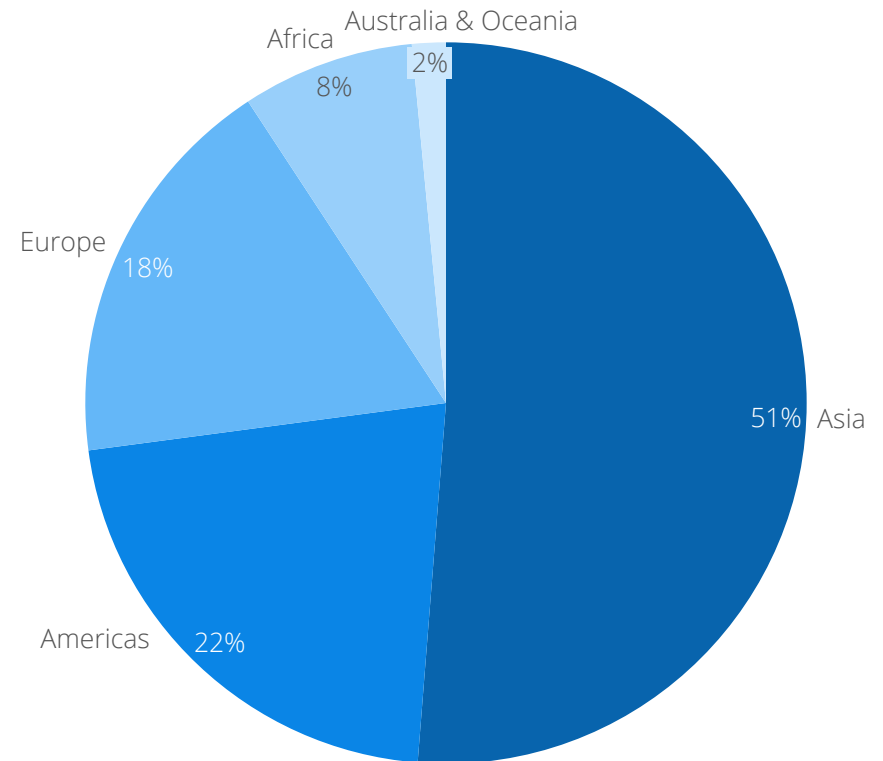
In 2019, Icelanders and the Swiss spent the most on Sports Equipment

Worldwide comparison

Revenue per capita ranking in US\$ in 2019



Revenue share in 2019



Sports Equipment sales in Europe will increase at a CAGR¹ of 2.2% from 2012 to 2025

KPI comparison – Europe (1/2)

Revenue in billion US\$

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR ¹
Toys & Hobby total	57.0	59.5	62.2	64.7	67.0	68.9	70.6	72.2	75.1	75.0	76.3	78.2	80.0	81.6	2.8%
Sports Equipment	18.6	19.3	20.0	20.5	20.9	21.3	21.7	22.1	21.2	22.3	23.1	23.7	24.2	24.7	2.2%
Share of total market (in %)	32.6	32.4	32.1	31.7	31.3	30.9	30.7	30.6	28.2	29.7	30.3	30.3	30.3	30.2	-0.6%

Revenue per capita in US\$

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR ¹
Toys & Hobby total	68.8	71.6	74.6	77.3	79.8	81.8	83.6	85.3	88.5	88.4	89.9	92.1	94.2	96.2	2.6%
Sports Equipment	22.4	23.2	23.9	24.5	24.9	25.3	25.6	26.1	25.0	26.3	27.2	27.9	28.5	29.1	2.0%

1: CAGR: Compound Annual Growth Rate / average growth rate per year from 2012 to 2025

Sources: [Statista Consumer Market Outlook](#) 2020

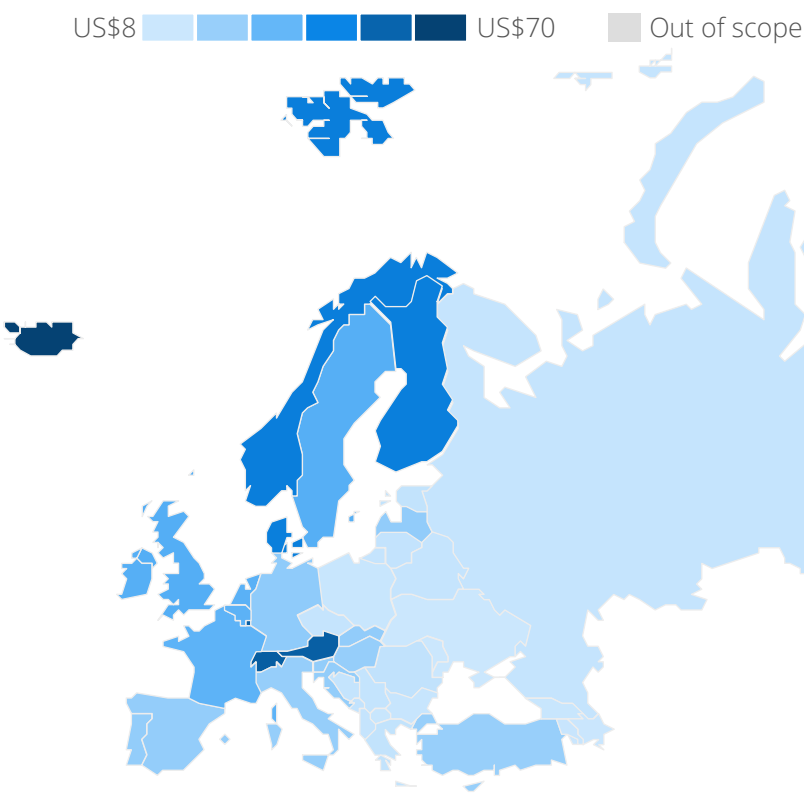
In Europe, the UK was the country with the highest revenue in the Sports Equipment segment

KPI comparison – Europe (2/2)

Revenue ranking in billion US\$ in 2019

United Kingdom		3.0
Germany		2.6
France		2.4
Russia		2.3
Turkey		1.7

Revenue per capita ranking in US\$ in 2019



Sports Equipment sales in the Americas will increase at a CAGR¹ of 3.3% from 2012 to 2025

KPI comparison – Americas (1/2)

Revenue in billion US\$

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR ¹
Toys & Hobby total	77.2	80.5	84.1	87.7	91.0	94.0	96.8	99.6	104.8	105.2	107.8	111.5	115.0	118.5	3.4%
Sports Equipment	20.9	21.8	22.7	23.5	24.3	25.1	25.8	26.7	26.2	27.6	28.7	29.8	30.8	31.7	3.3%
Share of total market (in %)	27.0	27.0	27.0	26.8	26.7	26.7	26.7	26.8	25.0	26.2	26.7	26.7	26.7	26.7	-0.1%

Revenue per capita in US\$

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR ¹
Toys & Hobby total	83.9	86.7	89.7	92.7	95.2	97.5	99.5	101.5	105.9	105.5	107.2	110.2	112.9	115.5	2.5%
Sports Equipment	22.7	23.4	24.2	24.9	25.4	26.0	26.5	27.2	26.5	27.6	28.6	29.4	30.2	30.9	2.4%

In the Americas, the U.S. was the country with the highest revenue in the Sports Equipment segment

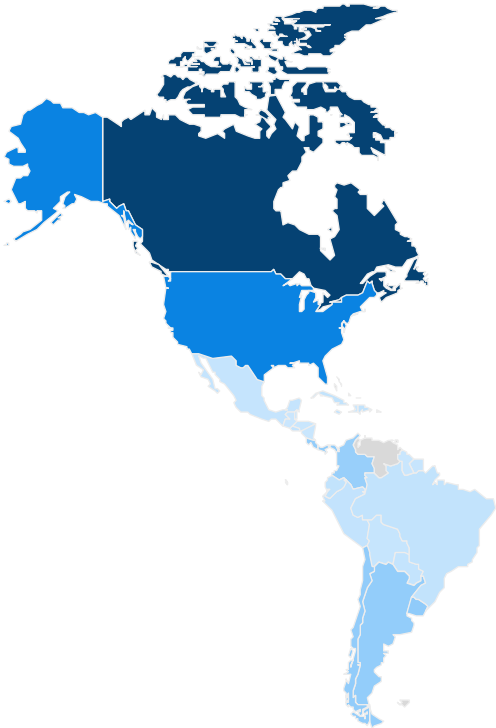
KPI comparison – Americas (2/2)

Revenue ranking in billion US\$ in 2019

United States		14.6
Brazil		3.3
Canada		2.4
Mexico		1.7
Argentina		1.0

Revenue per capita ranking in US\$ in 2019

US\$6  US\$63  Out of scope



Sports Equipment sales in Asia will increase at a CAGR¹ of 5.7% from 2012 to 2025

KPI comparison – Asia (1/2)

Revenue in billion US\$

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR ¹
Toys & Hobby total	142.2	154.7	168.0	181.5	194.7	207.5	220.1	232.9	252.6	259.3	271.6	287.3	302.7	318.1	6.4%
Sports Equipment	39.6	42.7	45.9	49.2	52.3	55.5	58.7	62.0	62.5	66.7	70.6	74.3	77.9	81.4	5.7%
Share of total market (in %)	27.8	27.6	27.3	27.1	26.9	26.7	26.7	26.6	24.7	25.7	26.0	25.8	25.7	25.6	-0.6%

Revenue per capita in US\$

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR ¹
Toys & Hobby total	34.7	37.3	40.1	42.9	45.6	48.2	50.6	53.1	57.1	58.2	60.5	63.5	66.5	69.4	5.5%
Sports Equipment	9.6	10.3	11.0	11.6	12.3	12.9	13.5	14.1	14.1	15.0	15.7	16.4	17.1	17.8	4.8%






1: CAGR: Compound Annual Growth Rate / average growth rate per year from 2012 to 2025

Sources: [Statista Consumer Market Outlook](#) 2020

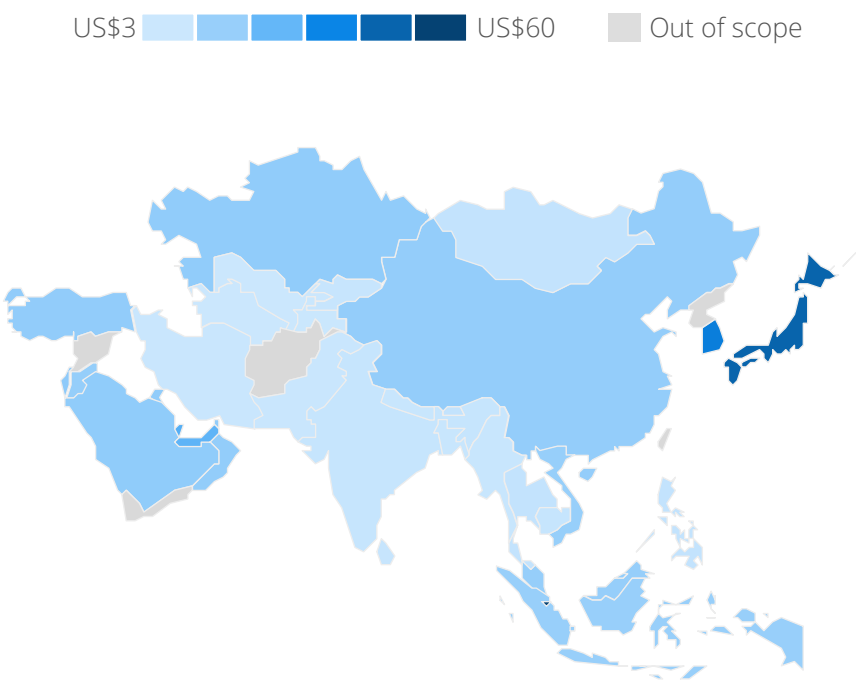
In Asia, China was the country with the highest revenue in the Sports Equipment segment

KPI comparison – Asia (2/2)

Revenue ranking in billion US\$ in 2019

China		27.3
India		11.7
Japan		6.2
Indonesia		4.0
South Korea		2.5

Revenue per capita ranking in US\$ in 2019



Sports Equipment sales in Africa will increase at a CAGR¹ of 6.0% from 2012 to 2025

KPI comparison – Africa (1/2)

Revenue in billion US\$

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR ¹
Toys & Hobby total	23.4	25.4	27.6	30.0	32.4	34.9	37.5	40.2	44.2	46.2	49.2	52.9	56.6	60.3	7.5%
Sports Equipment	6.1	6.5	6.9	7.4	7.9	8.4	8.9	9.5	9.5	10.3	11.0	11.7	12.4	13.0	6.0%
Share of total market (in %)	26.1	25.6	25.1	24.6	24.2	24.0	23.8	23.6	21.6	22.3	22.4	22.1	21.8	21.6	-1.4%

Revenue per capita in US\$

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR ¹
Toys & Hobby total	24.5	25.9	27.4	29.0	30.6	32.1	33.6	35.2	37.8	38.5	40.0	42.1	44.0	45.8	5.0%
Sports Equipment	6.4	6.6	6.9	7.1	7.4	7.7	8.0	8.3	8.1	8.6	9.0	9.3	9.6	9.9	3.4%

1: CAGR: Compound Annual Growth Rate / average growth rate per year from 2012 to 2025

Sources: [Statista Consumer Market Outlook](#) 2020

In Africa, Egypt was the country with the highest revenue in the Sports Equipment segment

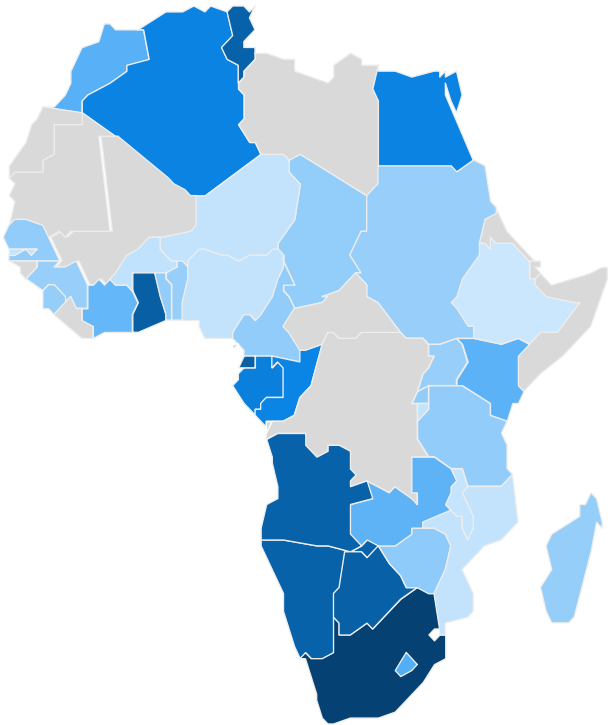
KPI comparison – Africa (2/2)

Revenue ranking in billion US\$ in 2019

Egypt		1.2
Nigeria		1.1
South Africa		1.0
Kenya		0.5
Algeria		0.5

Revenue per capita ranking in US\$ in 2019

US\$3      US\$17  Out of scope



Sports Equipment sales in Australia & Oceania will increase at a CAGR¹ of 2.6% from 2012 to 2025

KPI comparison – Australia & Oceania (1/2)

Revenue in billion US\$

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR ¹
Toys & Hobby total	5.2	5.5	5.7	6.0	6.3	6.5	6.7	7.0	7.4	7.4	7.5	7.8	8.0	8.3	3.6%
Sports Equipment	1.5	1.6	1.6	1.7	1.7	1.8	1.8	1.9	1.8	1.9	1.9	2.0	2.1	2.1	2.6%
Share of total market (in %)	28.7	28.4	28.0	27.6	27.3	27.1	26.9	26.7	24.1	25.4	25.8	25.7	25.6	25.6	-0.9%

Revenue per capita in US\$

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR ¹
Toys & Hobby total	146.3	150.6	155.3	160.1	164.4	168.4	171.9	175.3	184.5	181.7	183.3	187.1	190.7	194.2	2.2%
Sports Equipment	42.0	42.7	43.5	44.2	44.9	45.6	46.2	46.8	44.5	46.1	47.2	48.1	48.9	49.6	1.3%


1: CAGR: Compound Annual Growth Rate / average growth rate per year from 2012 to 2025

Sources: [Statista Consumer Market Outlook](#) 2020

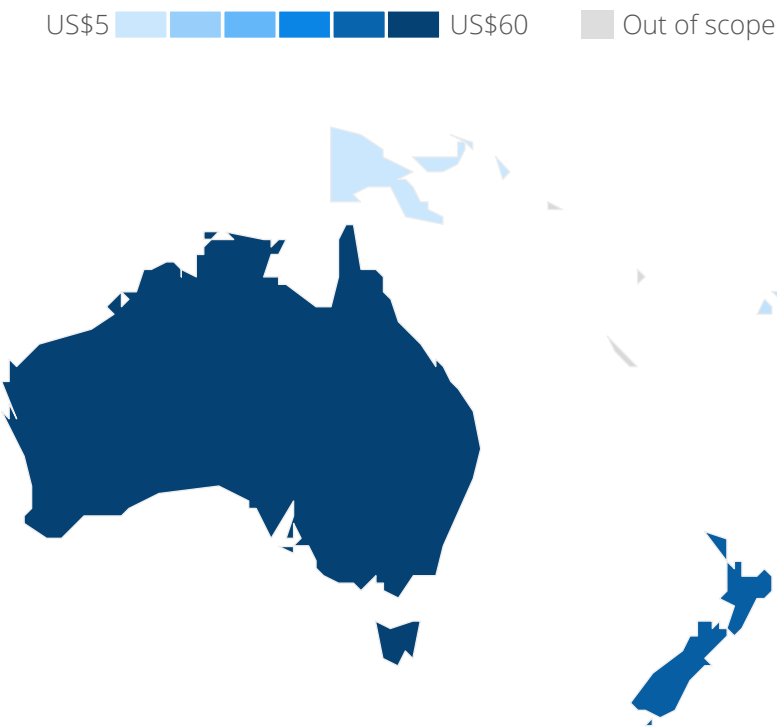
In Australia & Oceania, Australia was the country with the highest revenue in the Sports Equipment segment

KPI comparison – Australia & Oceania (2/2)

Revenue ranking in billion US\$ in 2019

Australia		1.51
New Zealand		0.29
Papua New Guinea		0.04
Fiji		0.01

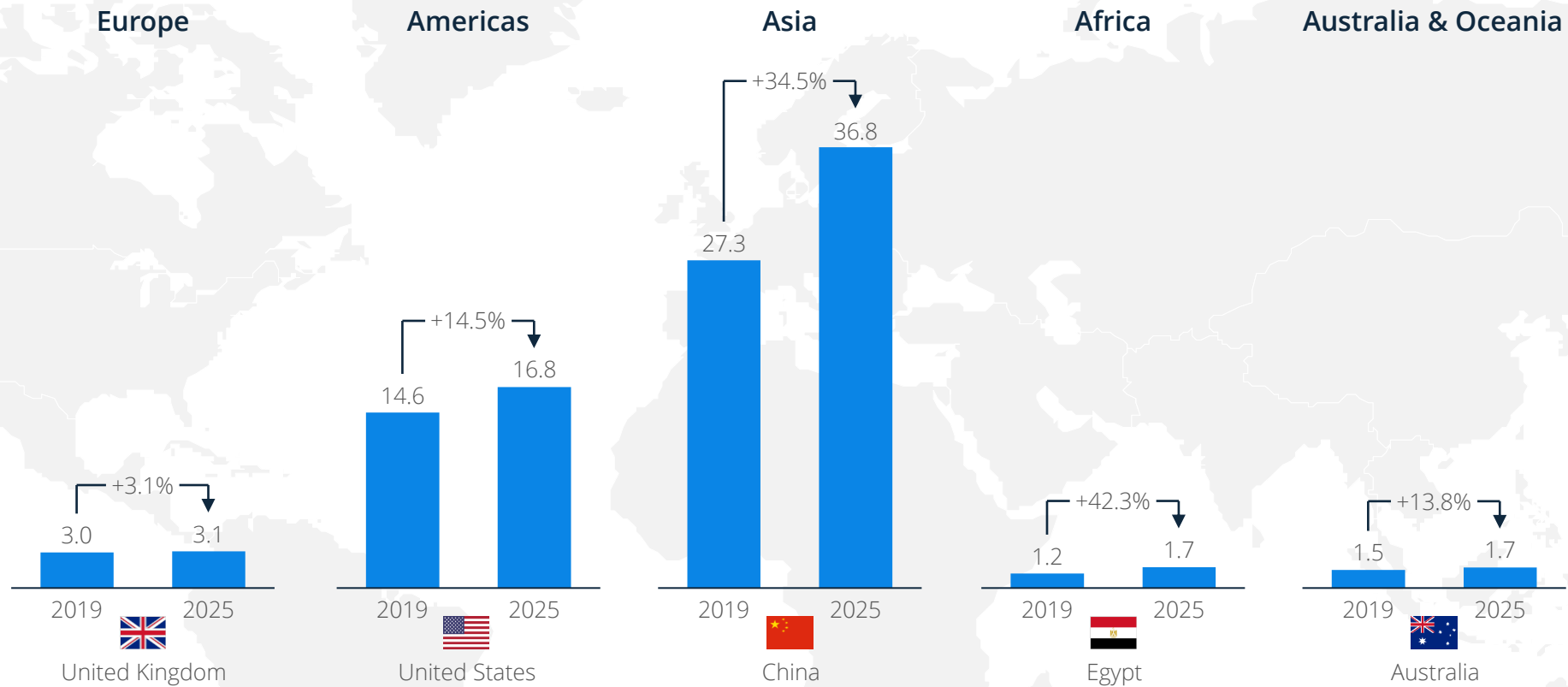
Revenue per capita ranking in US\$ in 2019



In Egypt, the Sports Equipment segment will grow by 42.3% from 2019 to 2025

Top countries by region

Revenue in the top countries in billion US\$¹



¹: Bar heights may vary due to rounded figures
Sources: [Statista Consumer Market Outlook](#) 2020

MUSICAL INSTRUMENTS



Parts & Accessories are an essential part of the Musical Instruments segment

Market definition



- The musical Instruments segments includes various acoustic and electronic or electromechanical musical instruments as well as their parts and accessories, sold both for private and public use (e.g. concert halls).

In scope

- Acoustic musical instruments
- Electronic and Electromechanical Musical Instruments
- Parts and accessories of musical instruments

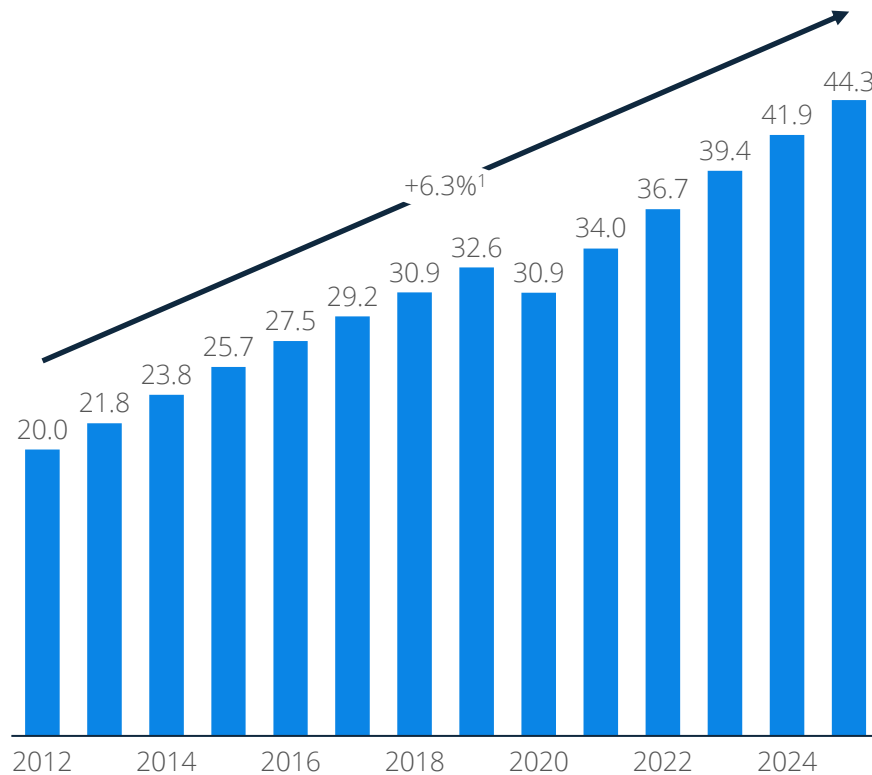
Out of scope

- Toy musical instruments

In 2019, worldwide Musical Instruments sales amounted to US\$32.6 billion

Segment overview

Worldwide revenue in billion US\$



Key takeaways

- The worldwide Musical Instruments revenue will increase at a CAGR¹ of 6.3% from 2012 to 2025.
- Due to COVID-19, the new 2020 forecast for the Musical Instruments segment is 10.4% lower than the original forecast.
- In the Musical Instruments segment, Austria (US\$15.2) and Canada (US\$13.6) had the highest annual revenue per capita in 2019.



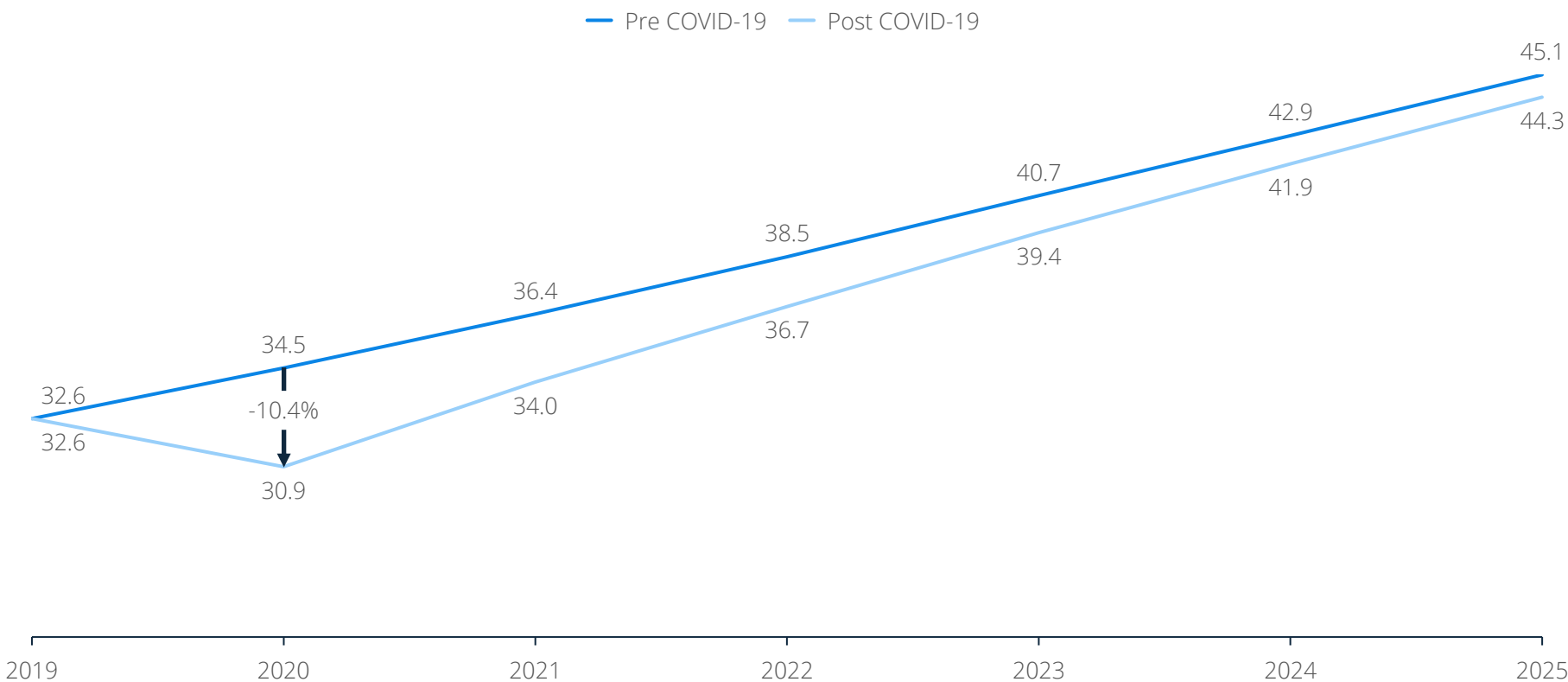
US\$32.6bn
in 2019

+6.3%
CAGR¹ 2012–2025

Due to COVID-19, the 2020 forecast for the Musical Instruments segment is 10.4% lower now

COVID-19 impact

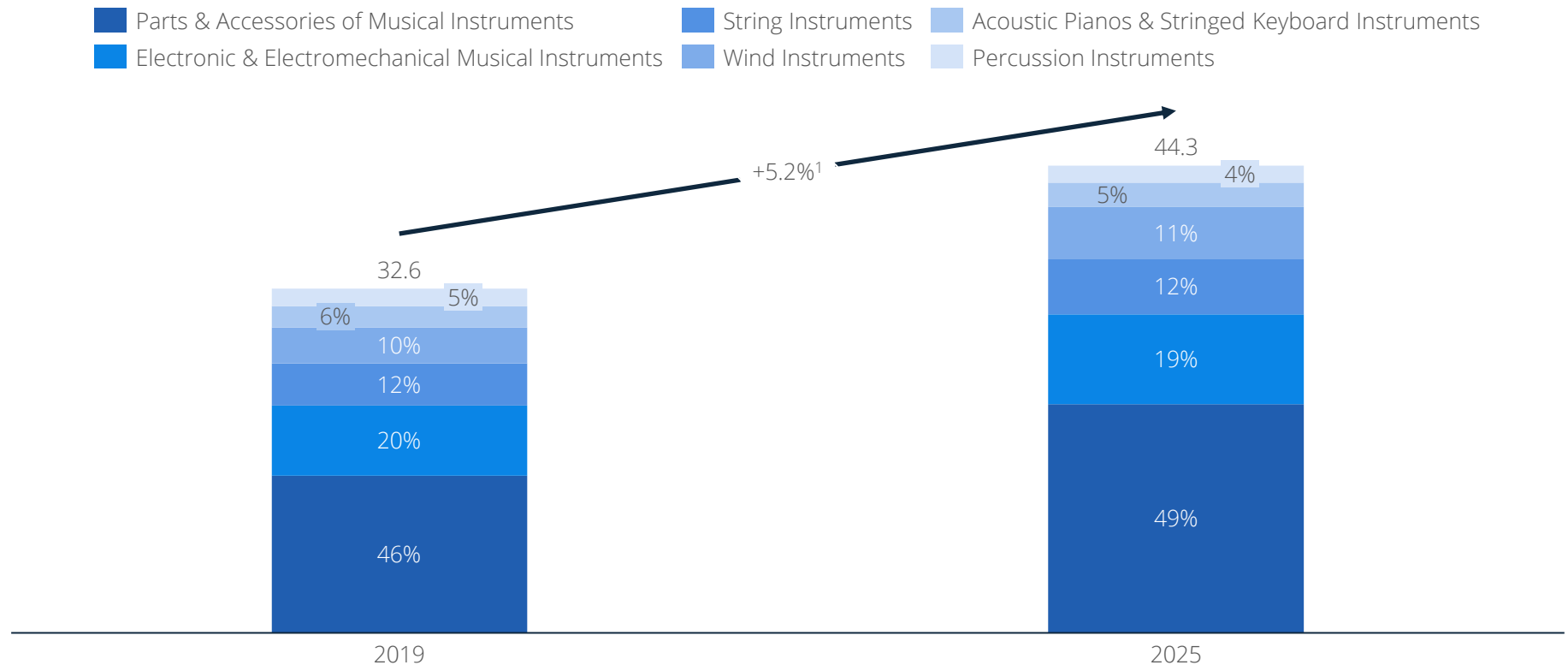
Worldwide revenue in billion US\$¹



Parts & Accessories generates the highest revenue in the Musical Instruments segment

Revenue share by subsegment

Worldwide revenue in billion US\$

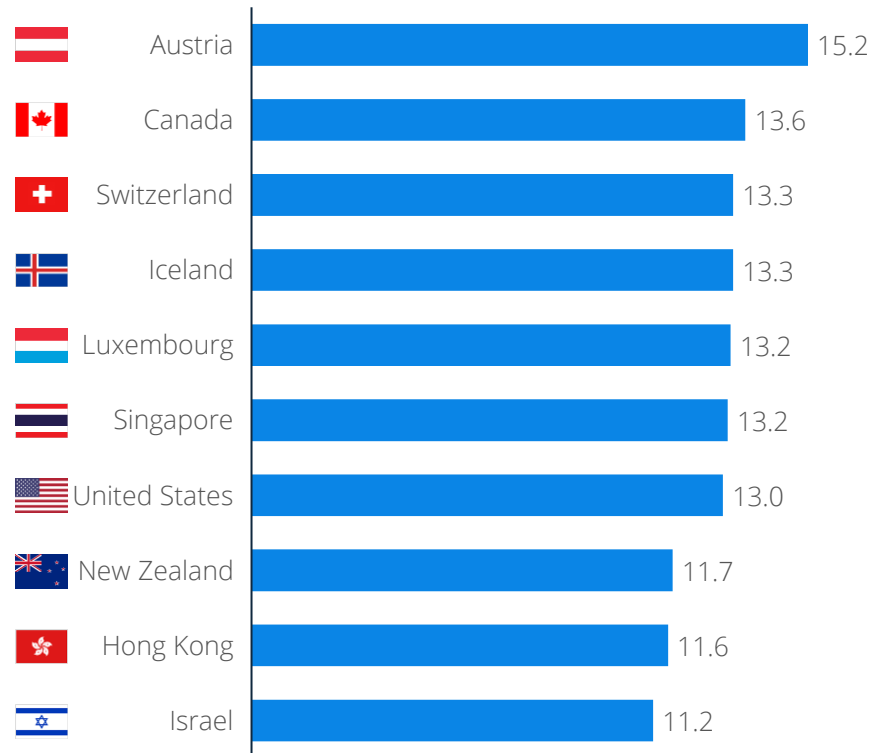


1: CAGR: Compound Annual Growth Rate / average growth rate per year
Sources: [Statista Consumer Market Outlook 2020](#)

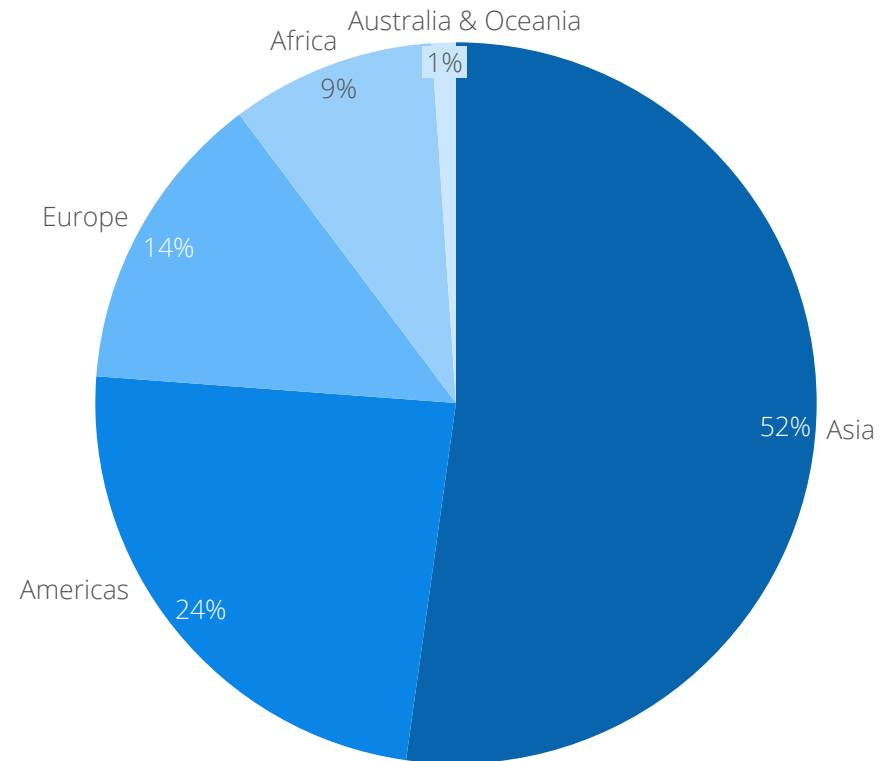
In 2019, Austrians and Canadians spent the most on Musical Instruments

Worldwide comparison

Revenue per capita ranking in US\$ in 2019



Revenue share in 2019



Musical Instruments sales in Europe will increase at a CAGR¹ of 3.5% from 2012 to 2025

KPI comparison – Europe (1/2)

Revenue in billion US\$

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR ¹
Toys & Hobby total	57.0	59.5	62.2	64.7	67.0	68.9	70.6	72.2	75.1	75.0	76.3	78.2	80.0	81.6	2.8%
Musical Instruments	3.4	3.6	3.8	3.9	4.1	4.2	4.4	4.5	4.1	4.5	4.8	5.0	5.2	5.3	3.5%
Share of total market (in %)	6.0	6.0	6.1	6.1	6.1	6.1	6.2	6.2	5.5	6.0	6.3	6.4	6.5	6.5	0.6%

Revenue per capita in US\$

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR ¹
Toys & Hobby total	68.8	71.6	74.6	77.3	79.8	81.8	83.6	85.3	88.5	88.4	89.9	92.1	94.2	96.2	2.6%
Musical Instruments	4.1	4.3	4.5	4.7	4.9	5.0	5.2	5.3	4.9	5.3	5.6	5.9	6.1	6.3	3.3%

1: CAGR: Compound Annual Growth Rate / average growth rate per year from 2012 to 2025

Sources: [Statista Consumer Market Outlook](#) 2020

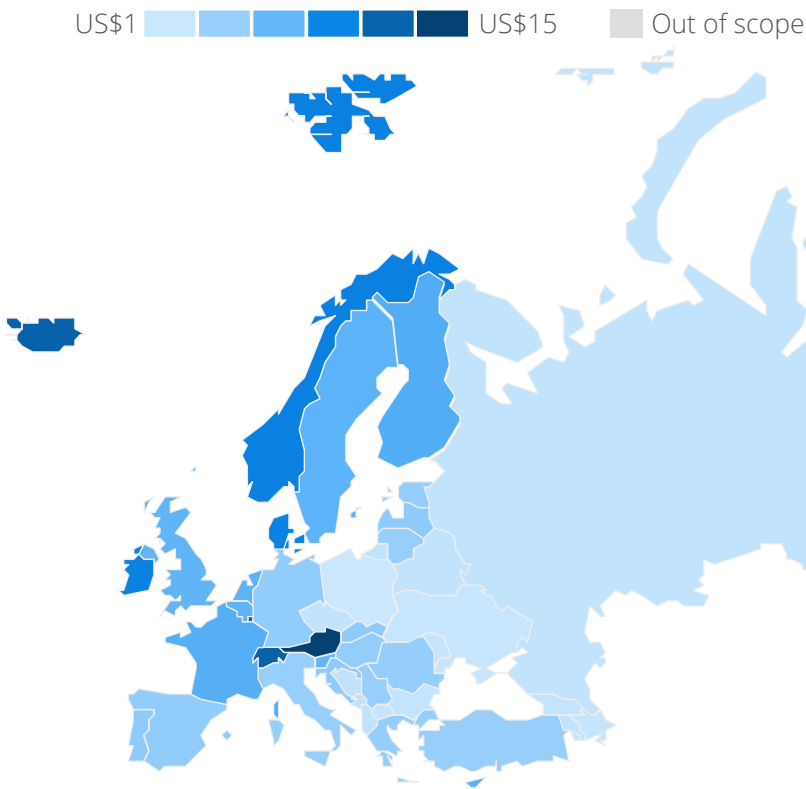
In Europe, France was the country with the highest revenue in the Musical Instruments segment

KPI comparison – Europe (2/2)

Revenue ranking in billion US\$ in 2019

France		0.6
Russia		0.5
United Kingdom		0.5
Germany		0.5
Turkey		0.3

Revenue per capita ranking in US\$ in 2019



Musical Instruments sales in the Americas will increase at a CAGR¹ of 4.9% from 2012 to 2025

KPI comparison – Americas (1/2)

Revenue in billion US\$

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR ¹
Toys & Hobby total	77.2	80.5	84.1	87.7	91.0	94.0	96.8	99.6	104.8	105.2	107.8	111.5	115.0	118.5	3.4%
Musical Instruments	5.3	5.7	6.2	6.6	6.9	7.2	7.6	7.9	7.3	8.0	8.6	9.1	9.6	10.0	4.9%
Share of total market (in %)	6.9	7.1	7.3	7.5	7.6	7.7	7.8	7.9	7.0	7.6	7.9	8.2	8.3	8.4	1.5%

Revenue per capita in US\$

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR ¹
Toys & Hobby total	83.9	86.7	89.7	92.7	95.2	97.5	99.5	101.5	105.9	105.5	107.2	110.2	112.9	115.5	2.5%
Musical Instruments	5.8	6.2	6.6	6.9	7.2	7.5	7.8	8.0	7.4	8.0	8.5	9.0	9.4	9.7	4.1%

1: CAGR: Compound Annual Growth Rate / average growth rate per year from 2012 to 2025

Sources: [Statista Consumer Market Outlook](#) 2020

In the Americas, the U.S. was the country with the highest revenue in the Musical Instruments segment

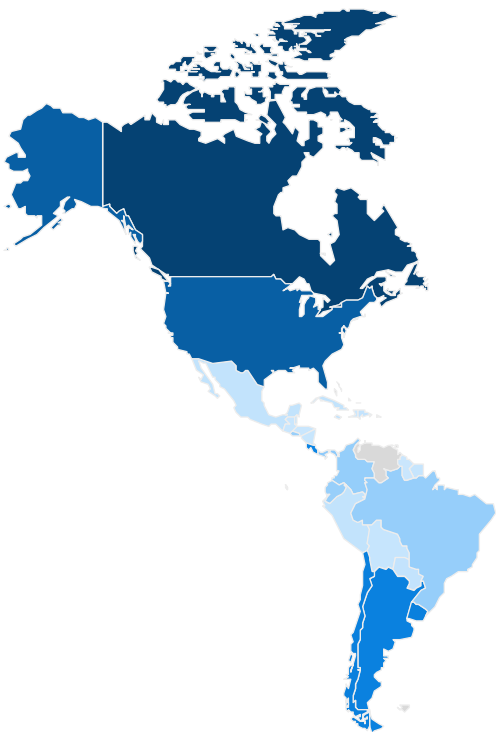
KPI comparison – Americas (2/2)

Revenue ranking in billion US\$ in 2019

United States		4.3
Brazil		1.0
Canada		0.5
Mexico		0.5
Argentina		0.5

Revenue per capita ranking in US\$ in 2019

US\$2     US\$14  Out of scope



Musical Instruments sales in Asia will increase at a CAGR¹ of 7.5% from 2012 to 2025

KPI comparison – Asia (1/2)

Revenue in billion US\$

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR ¹
Toys & Hobby total	142.2	154.7	168.0	181.5	194.7	207.5	220.1	232.9	252.6	259.3	271.6	287.3	302.7	318.1	6.4%
Musical Instruments	9.3	10.4	11.6	12.7	13.8	14.8	15.9	16.9	16.2	17.8	19.4	20.9	22.4	23.9	7.5%
Share of total market (in %)	6.6	6.7	6.9	7.0	7.1	7.2	7.2	7.3	6.4	6.9	7.1	7.3	7.4	7.5	1.0%

Revenue per capita in US\$

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR ¹
Toys & Hobby total	34.7	37.3	40.1	42.9	45.6	48.2	50.6	53.1	57.1	58.2	60.5	63.5	66.5	69.4	5.5%
Musical Instruments	2.3	2.5	2.8	3.0	3.2	3.4	3.6	3.9	3.7	4.0	4.3	4.6	4.9	5.2	6.6%


1: CAGR: Compound Annual Growth Rate / average growth rate per year from 2012 to 2025

Sources: [Statista Consumer Market Outlook](#) 2020

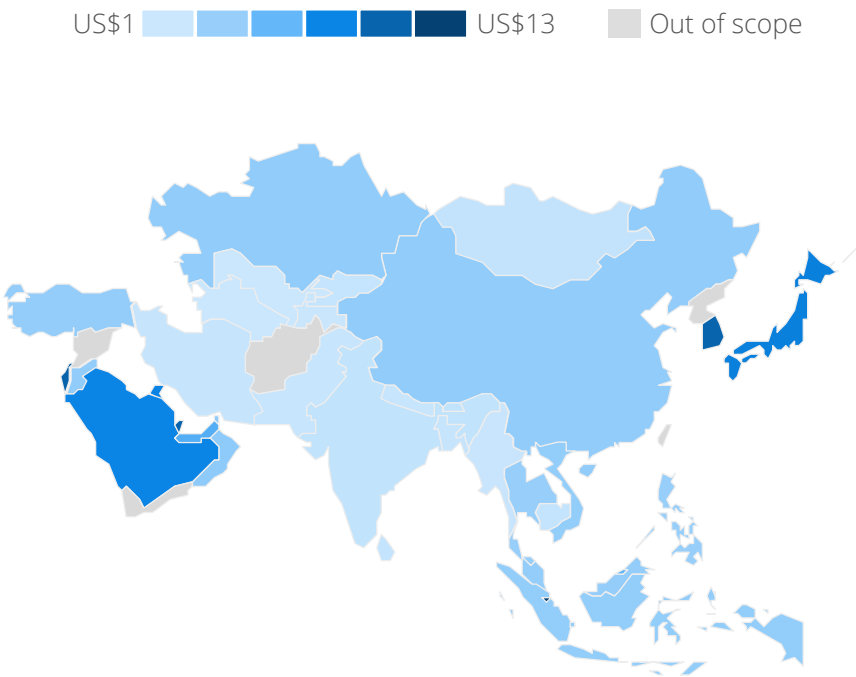
In Asia, China was the country with the highest revenue in the Musical Instruments segment

KPI comparison – Asia (2/2)

Revenue ranking in billion US\$ in 2019

China		6.8
India		3.9
Japan		1.3
Indonesia		1.2
South Korea		0.6

Revenue per capita ranking in US\$ in 2019



Musical Instruments sales in Africa will increase at a CAGR¹ of 8.5% from 2012 to 2025

KPI comparison – Africa (1/2)

Revenue in billion US\$

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR ¹
Toys & Hobby total	23.4	25.4	27.6	30.0	32.4	34.9	37.5	40.2	44.2	46.2	49.2	52.9	56.6	60.3	7.5%
Musical Instruments	1.6	1.8	2.0	2.2	2.4	2.6	2.8	3.0	2.9	3.3	3.6	4.0	4.3	4.7	8.5%
Share of total market (in %)	6.9	7.0	7.2	7.3	7.4	7.4	7.4	7.5	6.6	7.1	7.3	7.5	7.6	7.7	0.9%

Revenue per capita in US\$

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR ¹
Toys & Hobby total	24.5	25.9	27.4	29.0	30.6	32.1	33.6	35.2	37.8	38.5	40.0	42.1	44.0	45.8	5.0%
Musical Instruments	1.7	1.8	2.0	2.1	2.2	2.4	2.5	2.6	2.5	2.7	2.9	3.2	3.4	3.6	5.9%

1: CAGR: Compound Annual Growth Rate / average growth rate per year from 2012 to 2025

Sources: [Statista Consumer Market Outlook](#) 2020

In Africa, Egypt was the country with the highest revenue in the Musical Instruments segment

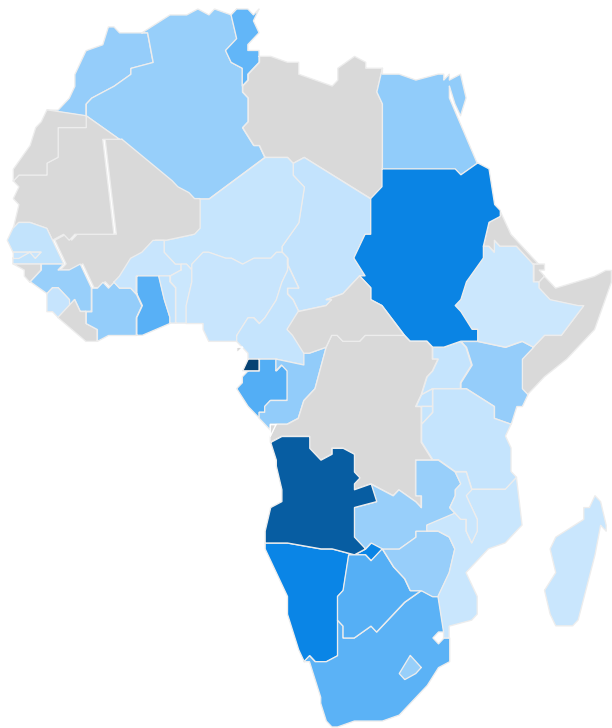
KPI comparison – Africa (2/2)

Revenue ranking in billion US\$ in 2019

Egypt		0.3
Nigeria		0.3
South Africa		0.3
Angola		0.3
Sudan		0.2

Revenue per capita ranking in US\$ in 2019

US\$1      US\$8  Out of scope



Musical Instruments sales in Australia & Oceania will increase at a CAGR¹ of 3.6% from 2012 to 2025

KPI comparison – Australia & Oceania (1/2)

Revenue in billion US\$

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR ¹
Toys & Hobby total	5.2	5.5	5.7	6.0	6.3	6.5	6.7	7.0	7.4	7.4	7.5	7.8	8.0	8.3	3.6%
Musical Instruments	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.4	0.3	0.3	0.4	0.4	0.4	0.4	3.6%
Share of total market (in %)	4.9	5.0	5.0	5.1	5.1	5.1	5.1	5.1	4.3	4.7	4.8	4.9	4.9	4.9	0.1%

Revenue per capita in US\$

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR ¹
Toys & Hobby total	146.3	150.6	155.3	160.1	164.4	168.4	171.9	175.3	184.5	181.7	183.3	187.1	190.7	194.2	2.2%
Musical Instruments	7.1	7.5	7.8	8.1	8.4	8.6	8.8	8.9	8.0	8.5	8.9	9.1	9.4	9.6	2.3%

1: CAGR: Compound Annual Growth Rate / average growth rate per year from 2012 to 2025

Sources: [Statista Consumer Market Outlook](#) 2020

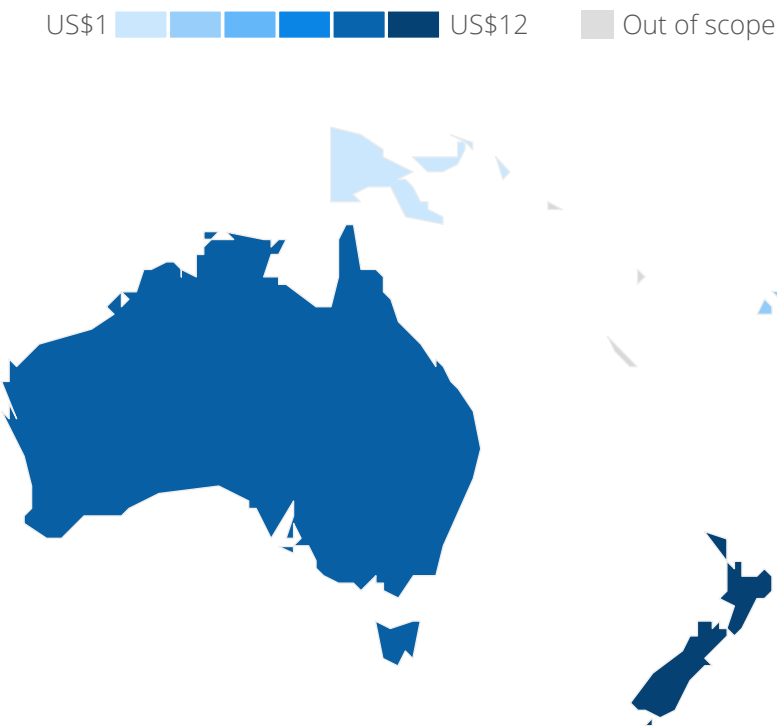
In Australia & Oceania, Australia was the country with the highest revenue in the Musical Instruments

KPI comparison – Australia & Oceania (2/2)

Revenue ranking in billion US\$ in 2019

Australia		0.28
New Zealand		0.06
Papua New Guinea		0.01
Fiji		<0.01

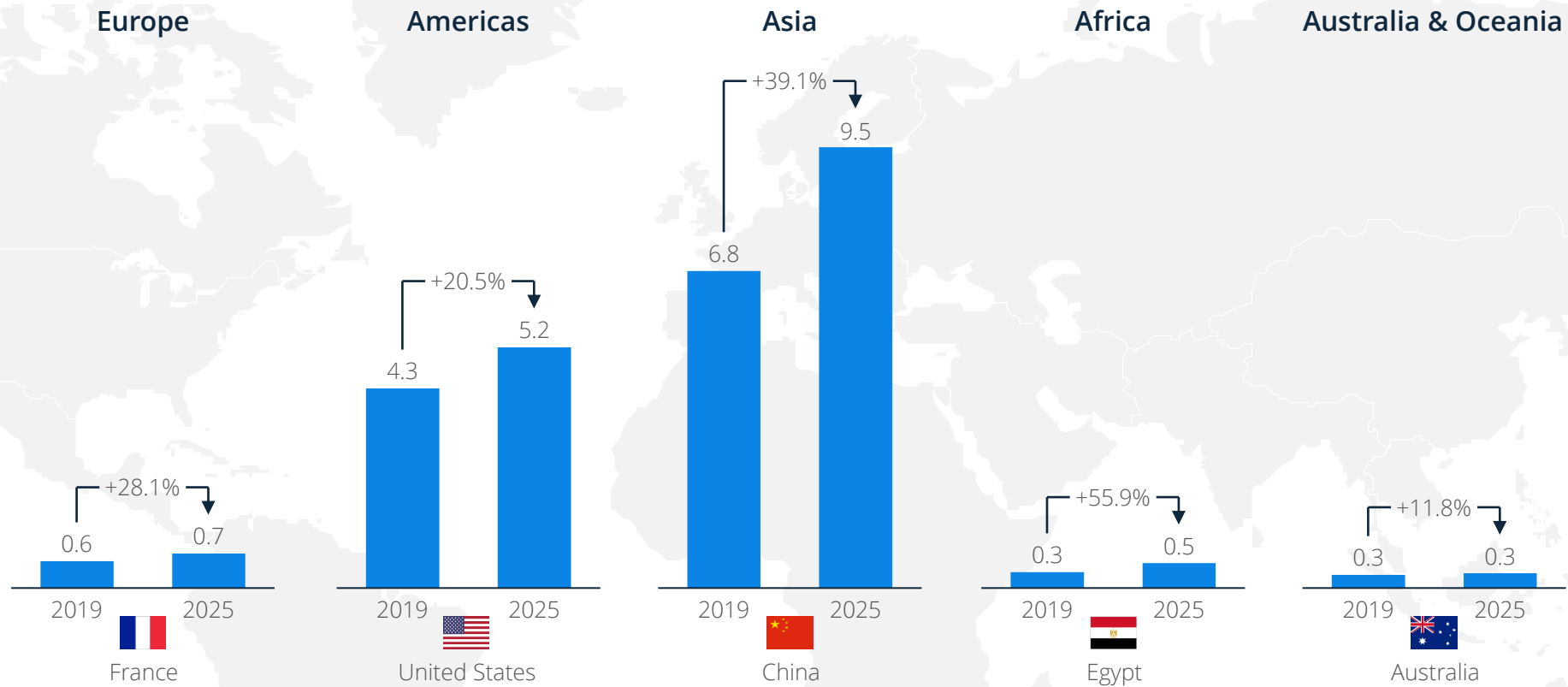
Revenue per capita ranking in US\$ in 2019



In Egypt, the Musical Instruments segment will grow by 55.9% from 2019 to 2025

Top countries by region

Revenue in the top countries in billion US\$¹



¹: Bar heights may vary due to rounded figures
Sources: [Statista Consumer Market Outlook](#) 2020

Agenda

01 Market Outlook

- Overview
- Market drivers
- Consumer insights
- Key players
- Trends

02 Segments

- Overview and sales figures
- COVID-19 impact
- KPI comparison
- Regional ranking

03 Appendix

- Product overview
- Authors

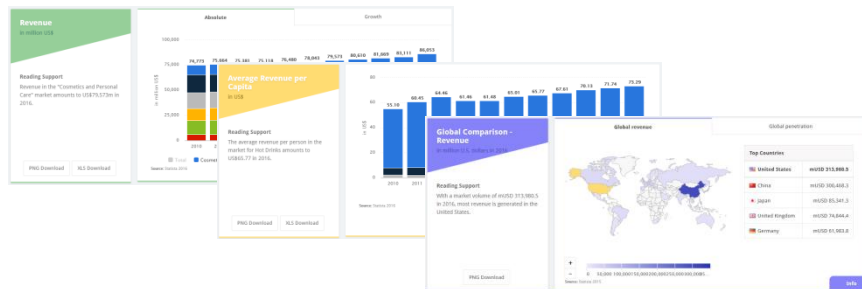
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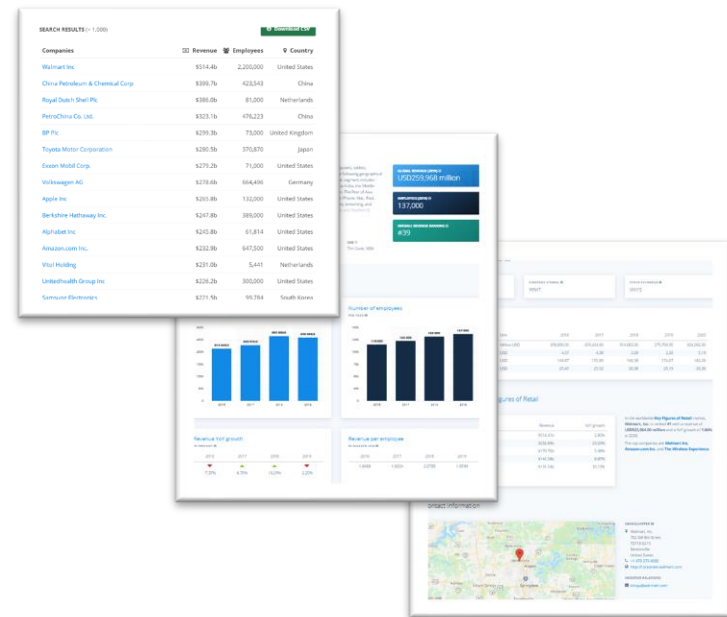
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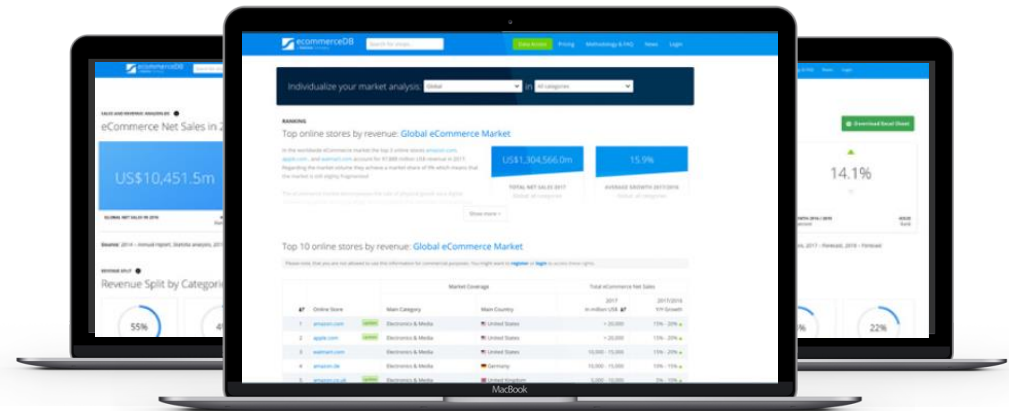
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