D3.2
The EU children's sector: unveiling its potential and opportunities

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KIDS Project Consortium is formed by:

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Contents of the report

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1. Introduction

The holistic approach followed by KID'S Cluster includes companies, products and services across many sectors gathering several value chains to serve the final end-user, including kids and their parents. However, information on these sectors at a global or EU level is somewhat limited and very fragmented.

To overcome these limitations and bring extra value to the analysis of this cross-sectoral industry, the aim of this report is **to deliver a comprehensive and aggregated view of the European children's industry, unveiling the full potential of its offer, and giving visibility to its strengths and business opportunities that arise**.

This study has a three-fold objective:

1. **Map the EU children's industry** to provide a trans-national overview.

1. Provide **inspiring and relevant insights** for the children's industry and "kid's sectors" in Europe and identify potential trends and business opportunities.
2. Identify and **map key relevant EU strategic partners** that add business value to the industry.
3. Identify **front-runner StartUps and SMEs leading innovation** in the EU markets.

<u>All the data and graphs dumped in this report have been made based on the information extracted from the sources indicated in the bibliography (*page 289*).</u>

The **"kids industry"** includes all the companies and organisations that manufacture and commercialize products and services for children from 0 to 12 years old. **The sectors in this industry cover all the needs of kids, their parents, their families and their immediate environment**.

In other words, **all these companies, products and services support children in their holistic, healthy, and balanced growth**.

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2. Areas of analysis

This report analyses the different sectors within the kid's industry that are included in the Kid's Cluster's scope. Both quantitative and qualitative information has been obtained for each of them, studying their potential at a European level and at the aggregate level for each of the countries.

2. 1. General Data

2.1.1. Geographic scope

2.1.2. Demography

2.2. Sectors

2.2.1. Games & Toys

2.2.2. Child Clothing

2.2.3. Child Food

2.2.4. Entertainment & Leisure

2.2.5. Education & publishing

2.2.6. Childcare Products

2.1. General Data

2.1.1. Geographic scope

2.1.2. Demography

Lifestyle & Design Cluster

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2.1.1. Geographic scope

Europe

In this report, every time the European continent is analyzed in its entirety, the **50 countries that are part of its territory** are considered to extract and analyze their information.

The following slide specifies the countries for which aggregated information has been extracted and analyzed.

2.1.1. Geographic scope

7 countries

This study includes the detailed analysis of **7 selected European countries** that provide an interesting and **representative sample of the European market**.

By geographical areas, the analyzed countries include:

- **Southern Europe**:
  - Spain
  - France
  - Italy
- **Center & Nordic Countries:**
  - Denmark
  - Germany
- **Eastern Europe**:
  - Poland
  - Slovakia

2.1.2. Demography

Adults

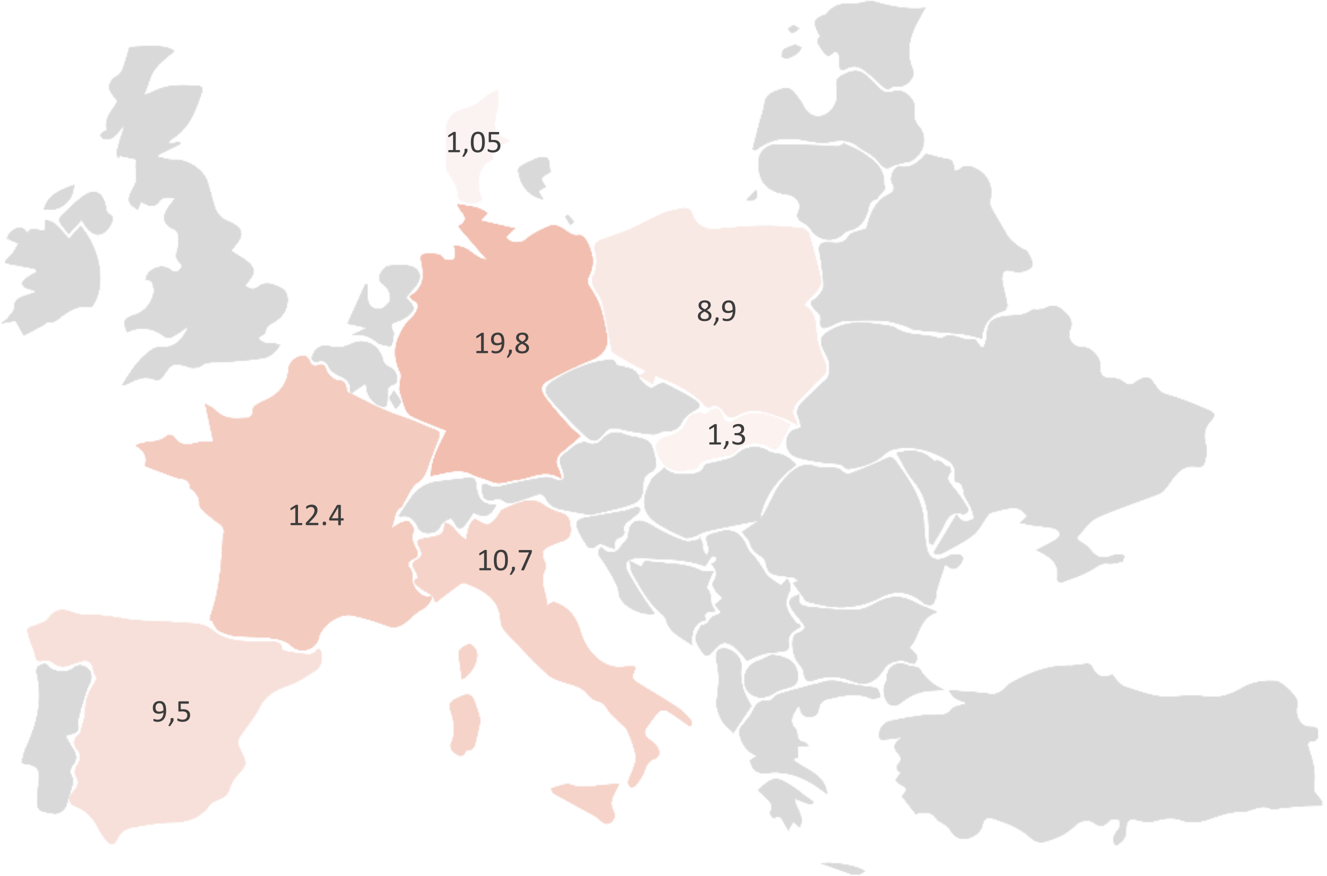
In most cases, the buyer and decision maker for children's products and services is not the end user or consumer, since it's generally adults who acquire them for their children or relatives.

Therefore, **the main consumer segment for children's products are adults** who buy products for children.

The average age of these consumers is **between 30 and 45 years**, with 31.22 years being the average age at which they have children.

This map shows the population between 30 and 45 years old in the analyzed countries:

- Total population – Adults between 30 to 45 years old
- 2019
- In millions inhabitants



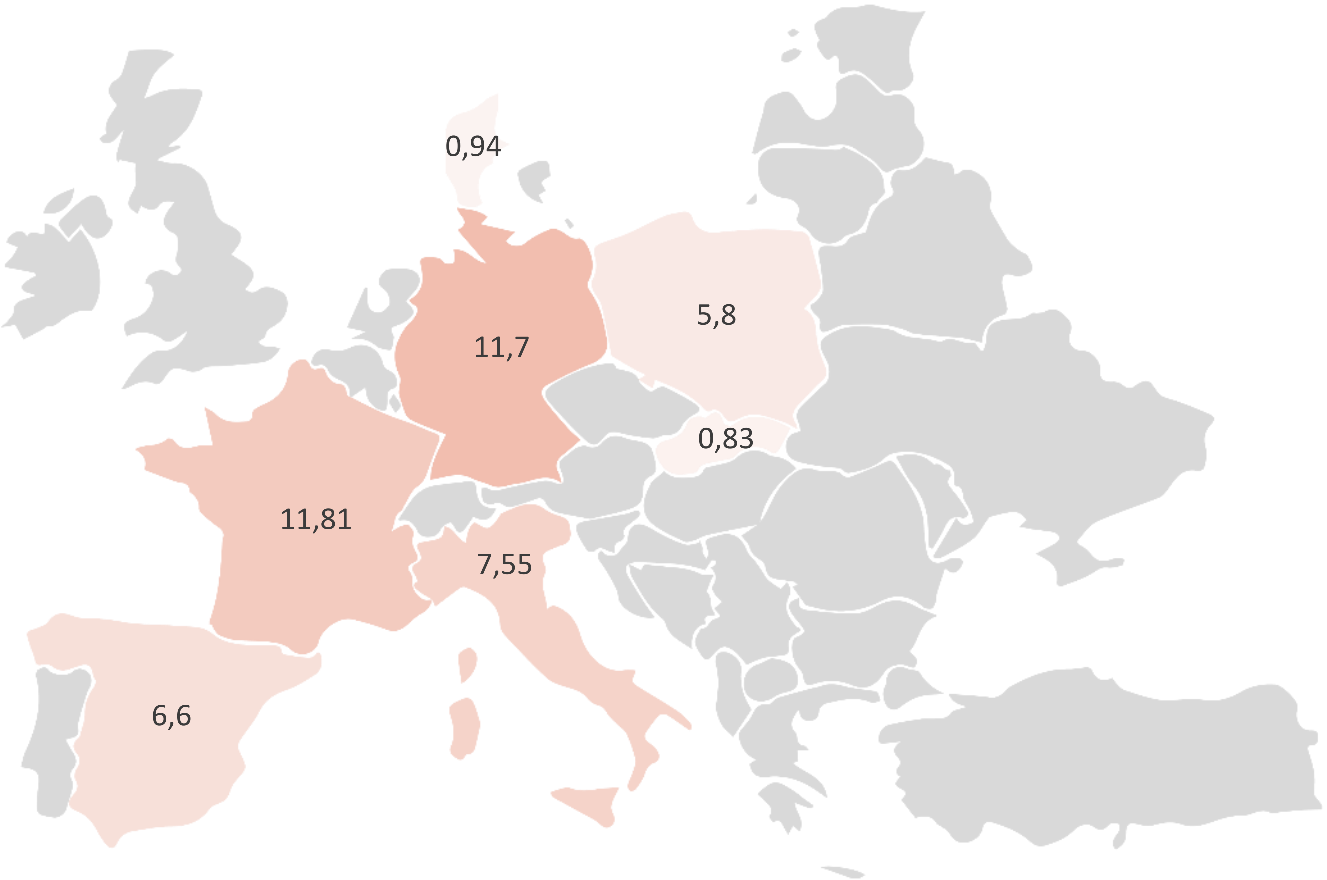
2.1.2. Demography

Kids

This study considers the needs, preferences and concerns of the end consumer of the products of this sector, **which are children between the ages of 0 and 12 years**.

The following map shows a comparison of the child (0-12 y.o.) population of each of the countries analyzed in the report, in millions of inhabitants.

This map can help you understand the report and many of the conclusions and insights that are drawn from it, as a starting point.



2.1.2. Demography

Key findings

Most European countries, such as the ones we have analysed, have **aged populations** and relatively low birth and fertility rates:

- **Italy, Germany and Spain have a significantly older population**, with a higher average age, and children represent only 13% of population (in Italy) or 14% (in Spain and Germany), compared to Denmark or France where children represent 16% and 17,5% of the population, respectively.
- Of the countries analysed, Germany has the largest population (83M in 2021), but **France has slightly more children (11,8M) than Germany (11,7M)**. Italy has 8M children, closely followed by Spain with 7M and Poland with 6M. Slovakia and Denmark only have 1M children each.
- The **average birth rate** in 2021 for the region is **9,1%** and the **fertility rate is 1,53 children per woman**. At 10,9% and 10,8%, **France and Denmark have the highest birth rates**, as well as the highest fertility rates. **Italy and Spain have the lowest birth rates**, well below the regional average, at 6,8% and 7,1% respectively.

With parents **starting their families at a later age** and **having less children**, new **attitudes, roles and priorities have transformed family dynamics**, creating **new needs and opportunities for products and services** across the kid's industry.

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Europe

Total population – Child population

Birth rate

Population average age

First child average age

Fertility rate

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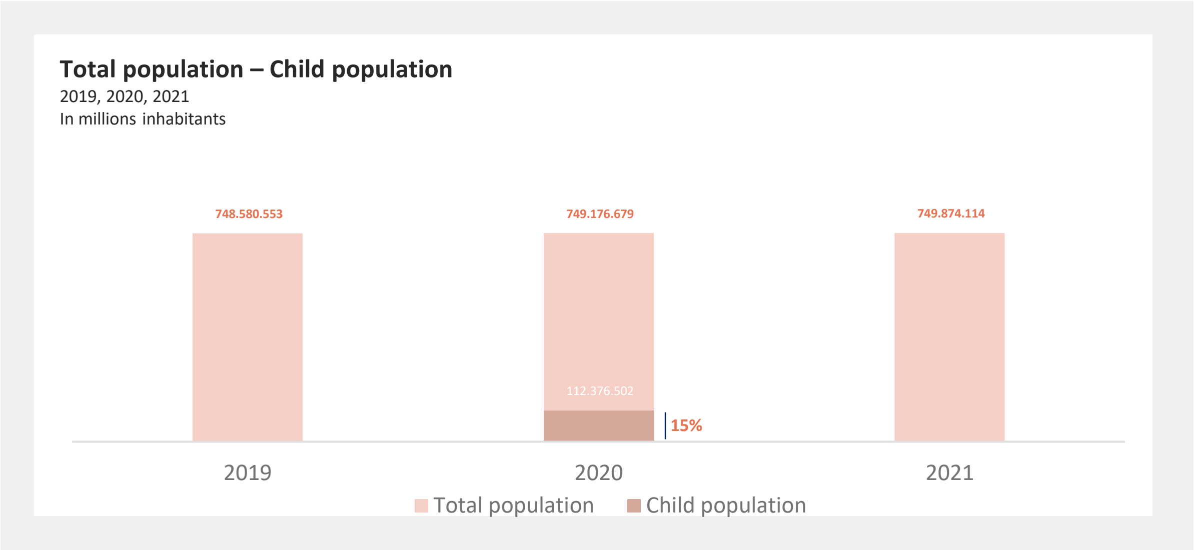
Europe population structure

In Europe, the fertility rate is **1,53 children**. In 2020, there were **112.376.502 million children in the continent**, representing **15% of** the European total population.



The European population has experienced a gentle growth in recent years. In 2020, the child population was 112 million inhabitants, a 15% of the total population

Birth rate (2021)	Population average age (2021)	First child average age (2021)	Fertility rate (2021)
9,1%	44 years old	29,5 years old	1,53

Spain

Total population – Child population

Households with children

Birth rate

Population average age

First child average age

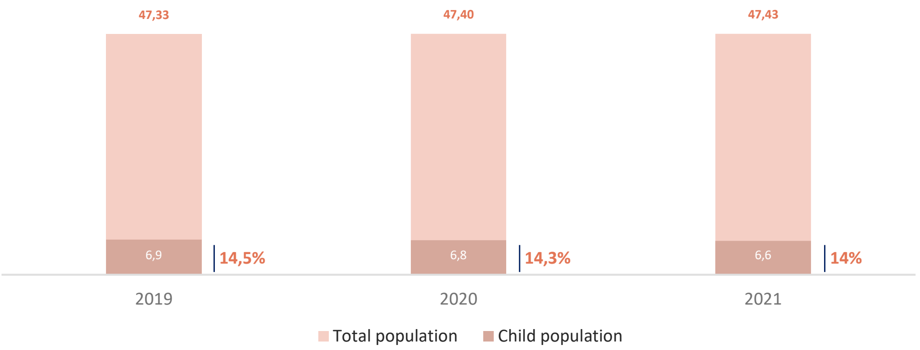
Fertility rate

Spanish population structure

In Spain, the fertility rate is **1.2 children**. There are **6.6 million children in the country**, representing **14%** of the country's total population. The population between 30 and 44 years of age and with children is an optimal segment.

Total population – Child population

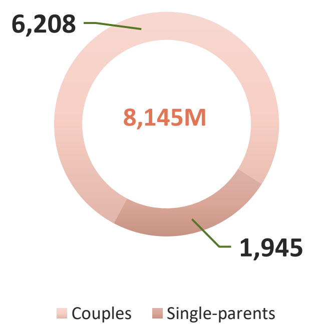
2019, 2020, 2021
In millions inhabitants



The Spanish population has experienced a gentle growth in recent years while the child population (boys and girls aged 0 to 14 years) has been subtly decreasing. In 2021, the child sector represented 14% of the total population in Spain.

Households with children

Couples, single-parent families
2021
In million inhabitants



Around 8 million households with children have been identified in Spain. Of these, 23% are single-parent families and the remaining 77% are couples with children.

Birth rate (2021)
7,1%

Population average age (2021)
44 years old

First child average age (2021)
32,6 years old

Fertility rate (2021)
1,2

France

Total population – Child population

Households with children

Birth rate

Population average age

First child average age

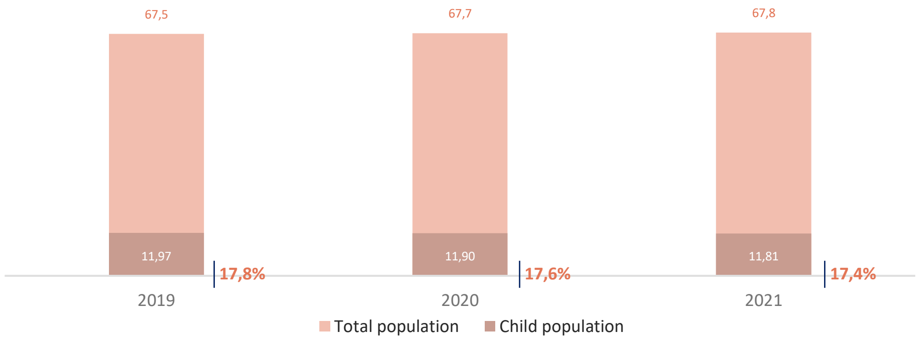
Fertility rate

French population structure

In France, the fertility rate is **1.83 children**. There are **11.81 million children in the country**, representing **17.4%** of the country's total population.

Total population – Child population

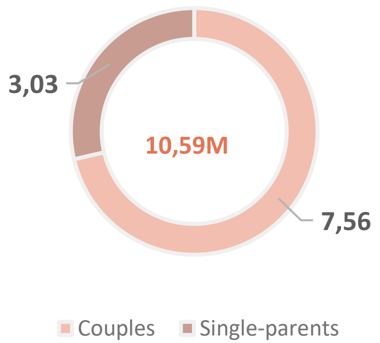
2019, 2020, 2021
In millions inhabitants



The total population of France records a slight decline of 0.5% in 2021 compared to 2019. On the other hand, the child population also suffers this decrease of 0.74% with respect to 2020.

Households with children

Couples, single-parent families
2021
In million inhabitants



In 2021, a total of 10.59 million households with children are registered in France, without knowing the exact distribution of their age range.

Birth rate (2021) 10,9%	**Population average age (2021)** 42 years old	**First child average age (2021)** 30,8 years old	**Fertility rate (2021)** 1,83

Italy

Total population – Child population

Households with children

Birth rate

Population average age

First child average age

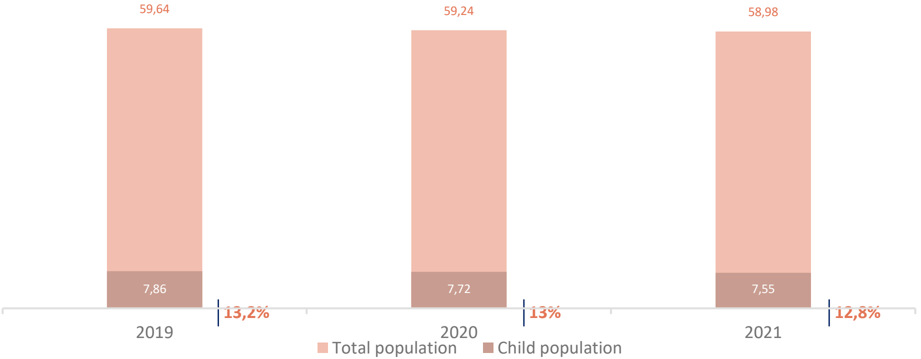
Fertility rate

Italian population structure

In Italy, the fertility rate is **1.24 children**. There are **7,55 million children in the country**, representing **12.8%** of the country's total population.

Total population – Child population

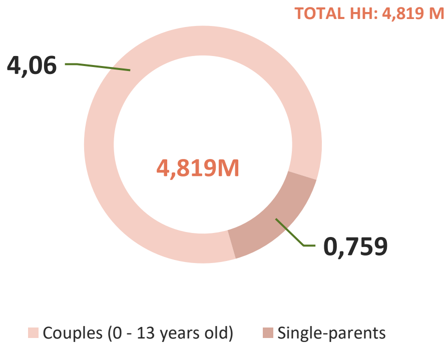
2019, 2020, 2021
In millions inhabitants



Italy's total population registers in 2021 a notorious decrease of 1.1% compared to 2019. On the other hand, the child population also suffers this continuous decline year after year since 2019, with the declines being 1.8% and 2.19% in 2020 and 2021, respectively.

Households with children aging between 0-13

Couples, single-parent families
2021
In million inhabitants



In 2021, the number of Italian households with children aged 0-13 decreased by 3% compared to the previous year. In Italy there are 4.82 million households with children.

Birth rate (2021)
6,8%

Population average age (2021)
46 years old

First child average age (2021)
32,4 years old

Fertility rate (2021)
1,24

Denmark

Total population – Child population

Birth rate

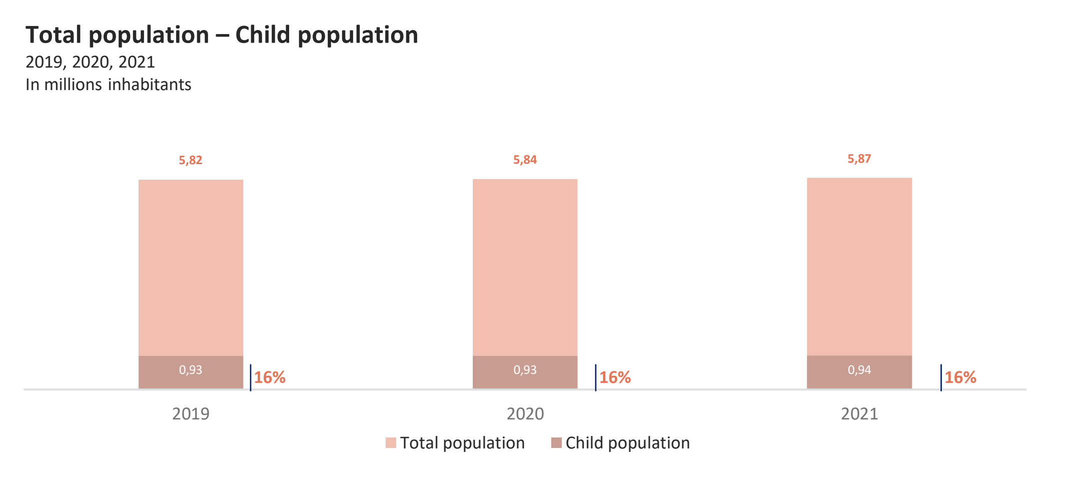
Population average age

First child average age

Fertility rate

Danish population structure

In Denmark, the fertility rate is **1,68 children**. There are **0.94 million children in the country**, representing **16%** of the country's total population.



Denmark's total population registers in 2021 a soft increase of 0.9% compared to 2019. On the other hand, the child population also increases, while the proportion of the total population remains steady.

Birth rate (2021)
10,8%

Population average age (2021)
42 years old

First child average age (2021)
29,8 years old

Fertility rate (2021)
1,68

Germany

Total population – Child population

Households with children

Birth rate

Population average age

First child average age

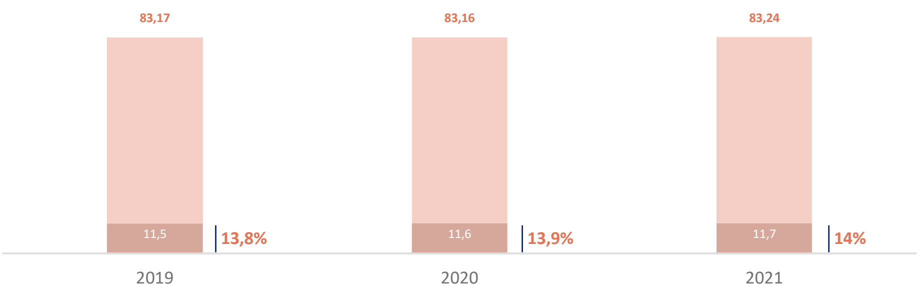
Fertility rate

German population structure

In Germany, the fertility rate is **1.53 children**. There are **11.7 million children in the country**, representing **14%** of the country's total population.

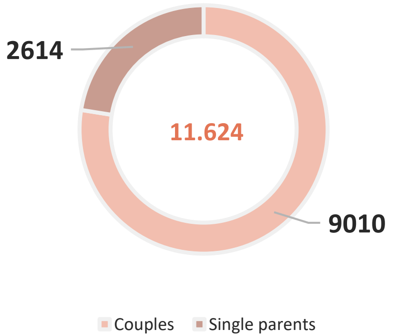
Total population – Child population

2019, 2020, 2021
In millions inhabitants



Households with children

Couples, single-parent families
2021
In thousands inhabitants



Germany's total population records a mild 1% increase in 2021 compared to 2019. On the other hand, the child population also increases, at the same time as its share of the total population increases.

Birth rate (2021)	Population average age (2021)	First child average age (2021)	Fertility rate (2021)
9,6%	45 years old	30,5 years old	1,53

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Poland

Total population – Child population

Birth rate

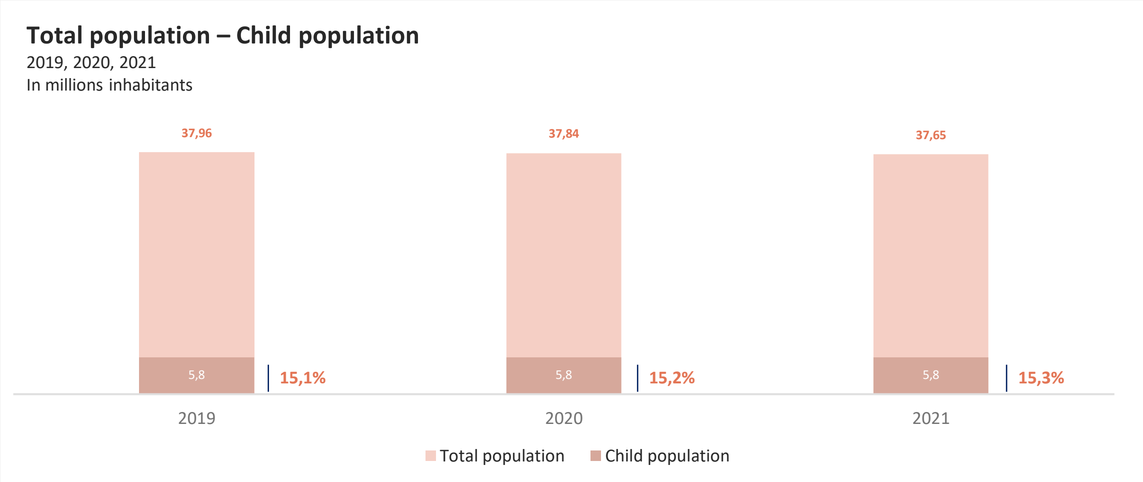
Population average age

First child average age

Fertility rate

Poland population structure

In Poland, the fertility rate is **1,39 children**. There are **5.8 million children in the country**, representing **15,3%** of the country's total population.



Poland's total population registers a slightly decrease of 0.8% in 2021 compared to 2019. On the other hand, the child population also experiences a minor decline, although its share of the total population increases.

Birth rate (2021)
8,8%

Population average age (2021)
42 years old

First child average age (2021)
27,9 years old

Fertility rate (2021)
1,39

Slovakia

Total population – Child population

Birth rate

Population average age

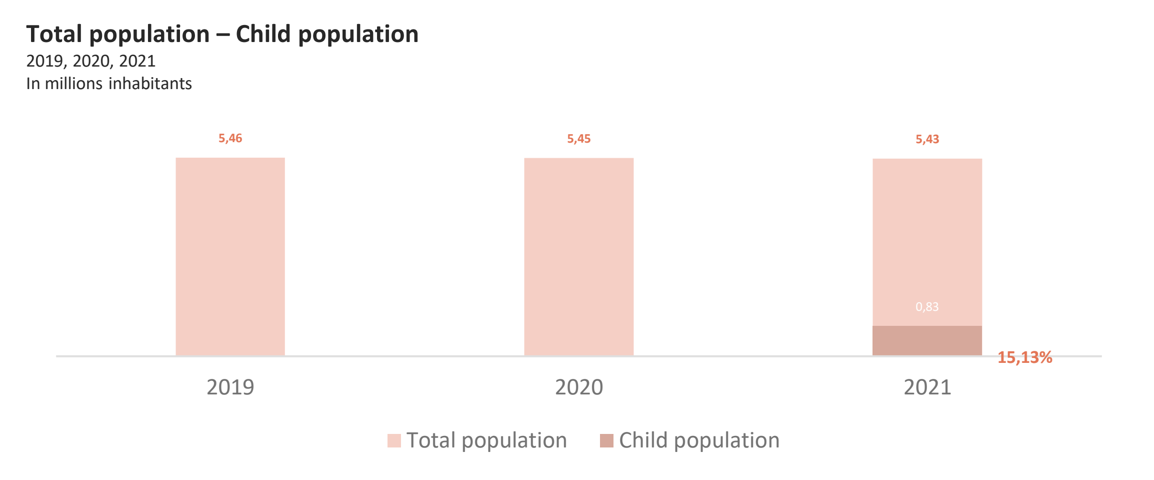
First child average age

Fertility rate

Funded by the European Union

Slovak population structure

In Slovakia, the fertility rate is **1,59 children**. There are **0,83 million children in the country**, representing **15,13%** of the country's total population.



Slovak's total population registers a slightly decrease of 0.36% in 2021 compared to 2020. In 2021, the children population was about 0,83 million inhabitants, a 15,3% of the total population.

Birth rate (2021)
10,4%

Population average age (2021)
39.2 years old

First child average age (2021)
27,3 years old

Fertility rate (2021)
1,59

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2.2. Sectors

2.2.1. Games & Toys

2.2.2. Child Clothing

2.2.3. Child Food

2.2.4. Entertainment & Leisure

2.2.5. Education & Publishing

2.2.6. Childcare Products

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Key figures “Kids sectors”

Europe 50

115,54
Revenue in BEUR 2021

-0,98%
CAGR 2020 – 2022

Examined 7 countries

46,77
Revenue in BEUR 2021

40,5%
Contribution to Europe 50

-0,71%
CAGR 2020 – 2022

Please, note that these calculations **collect data from four sectors examined in this study: Toys & Games, Clothing, Food and Childcare.** ‘Europe’ represent all the countries aggregated in the European continent, whereas ‘Examined countries’ are the seven countries analysed in this study: Spain, France, Italy, Slovakia, Denmark, Germany and Poland.

Lifestyle & Design Cluster
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2.2. Sectors

Key findings

- In terms of market size, for those sectors where comparable data is available, **the largest sectors aimed at children and families in the countries analysed are children's clothes** (22B € in 2021) **closely followed by toys** (21,8B € in 2021), representing almost 50% each of the sectors analyzed. Other sectors represent much smaller markets: children's food generated 2,7B € revenue and childcare [(1)] products only 0,3B € in the same year.
- Comparing countries, overall **Germany has the highest revenue for all the sectors where we have comparable data**, with 15,65B€ in 2021, **followed by France** (10,6B €), Italy (9,4B €) and Spain (5,9B €), and finally by Poland (3,2B €), Denmark (1,3B €) and Slovakia (0,6B €).
- **The revenue of games & toys, clothing, food and childcare amounted 115,54B € in 2021 in the European continent**. For the countries analyzed in this study, this amount was 46,77B € for the same economic period. The countries examined represent **40,5%** of the total European continent revenue for the year 2021.
- In 2022, the CAGR for the entire continent and for the countries examined declined at a low pace compared to 2018.

(1) Note childcare only includes body care products in this report.

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2.2.1. Games & Toys

The **definition of toy** is given by Directive 2009/48/EC of the European Parliament on the safety of toys and defines them as those "products designed or intended, exclusively or not, **to be used for play purposes by children under fourteen years of age**".

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2.2.1. Games & Toys

Key findings

The **European toy market** is the third region in sales behind North America and Asia.

- The 7 countries we have analysed in depth represented **almost 40% of the overall European toys market in 2021**.
- Within the markets analysed, **Germany and France** have the largest markets in terms of revenue, followed by **Italy and Spain**, and finally by **Poland, Denmark and Slovakia. Germany and Denmark's toys markets are comparatively larger** among the countries analysed, with an above average revenue per child.
- The market size in 2021 was estimated at **56,34 In billion Euros**, with an expected **2% CAGR** (2018-2023). The market forecasts expect a **dip in revenue and spending for 2022 consistent across the region, showing recovery in the following year** just above 2020 figures.
- **Poland, Germany and Slovakia** are the countries with the **largest expected CAGR** (4,3%, 3,3% and 3,1% respectively), whereas **France's market is expected to decrease**, with a –0,78% CAGR.
- The highest volume of sales come from **video games consoles**, with gaming having become a key sub-category within the industry and with a higher average price. Other relevant product categories include **plastic toys, toys for toddlers, construction sets or dolls and stuffed toys**.
- Some categories such as videogames show significant growth in the last few years, but in general **the weight of the different categories in the market remains stable.**

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2.2.1. Games & Toys

Purchasing behaviours

Toys are the **main gift category** for children.

- **Videogames consoles are the highest revenue category** in most markets analysed, although there are **some exceptions**: in Italy, plastic toys are still the main category, and in Poland, the market is more traditional, with fewer videogames consoles sold and more dolls, stuffed toys or toys for toddlers.
- **Toys for toddlers** are significant sub-categories in the Spanish, Italian and French markets, and German consumers are keener on **construction sets and models** than other markets.
- Key **decision drivers** when choosing a toy are a **child's request** and **value for money**. Today's children are increasingly well-informed and demanding consumers, looking for **innovative, creative and surprising toys**. Their parents also favour i**nteractive and multi-functional** toys that **encourage family play or stimulate learning and child development**.

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2.2.1. Games & Toys

Videogames and high-tech innovative toys

The toy industry faces increased competition from online entertainment, gaming and digital devices, which favours **a shift from traditional toys to more high-tech value propositions**, as well as innovative toys and new brands aimed at older children and teenagers.

- **Sales of games consoles have become one of the largest and fastest growing categories** within the toy industry. In some countries, such as France or Spain it has become the largest category in terms of revenue.
- The **videogames industry** has shown significant growth in the last few years, also accelerated in 2020 because of the pandemic, reaching 28,43 In billion € in revenue in 2020 (up from 19,70 In billion € in 2017).
- There are gamers of all ages, but **children are still a significant consumer segment for videogames**, with up to 73% of games considered suitable for kids under 12 according to the European rating system. 70% of kids between 6 and 8 years old, and 80% of those between 10 and 14, play videogames.

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2.2.1. Games & Toys

Going digital: growth in ecommerce

Although **most toys are sold offline through large retailer department scores and specialized toy stores**, toy shoppers have become more digital by combining purchases in both online channels and physical stores.

All European markets have shown a significant growth in online sales, which accelerated in 2020 due to the COVID-19 crisis. **Currently, 1 in every 4 toys in Europe is sold online.**

- France and Germany have the highest percentage of online toy shoppers (35,5% and 28% in 2021). On the other hand, only 12,5% of Italian shoppers, 16,5% of Poles and 17,5% of Spaniards purchase toys online.

- Online sales grew by 19% in the region due to COVID, but some countries experienced very significant growth: 75% in Spain, 37% in Italy or 30% in Denmark.

- The main reasons consumers prefer to purchase toys online are related to convenience: receiving products at home and saving time. Other advantages of online shopping that consumers appreciate are the availability of larger assortments and being able to read other buyer's opinions.

- Most online toy purchases are made through large ecommerce sites, such as Amazon or Aliexpress, as well as large retailer websites for local department stores, followed by specialist online toy shops or toy brand websites who have started to invest in their own online distribution.

- Retail innovation has focused on transforming shopping experiences to make the more playful and attractive. Nevertheless, although in some markets, such as Poland, specialist toy stores are still the main point of sale, in other countries like Germany, the toy retail trade is slowly disappearing, with store closures exacerbated due to changing consumer habits and the pandemic.

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2.2.1. Games & Toys

Significant trends

Sustainability

- The toy industry has been heavily influenced by consumer demands towards more sustainable and eco-conscious values.
- The demand for sustainability translates into the development of manufacturing processes that are better for the environment as well as into the use of more sustainable or recycled materials to make toys and new products that promote environmental awareness and values.

Safety and quality

- Safety is very important for European toy consumers, especially in products aimed at babies and toddlers.
- Safety, quality and educational value become more relevant than price for toy consumers in mature, high-income markets, such as Germany or Denmark.

Kidults

- More and more adults want to enjoy brands and products traditionally aimed at kids with which they have an emotional connection.
- The adult toy market is becoming a significant niche, with many top toy companies developing product lines aimed at these consumers, including the larger European brands, LEGO and Playmobil.

2.2.1. Games & Toys

The toy industry in the region

Germany, Italy and Spain have the **largest toy industries** in Europe.

- Most companies sell in their own market but also export a **significant part of their production**, especially to their neighbouring countries and other markets within the European region.

- LEGO in Denmark is the most important toy company in Europe but across the region, **the sector is generally fragmented, comprised mainly of SME's**, with revenue usually concentrated in a few top companies in each market.

- European toys are made with a **focus on design, quality and learning values while maintaining a competitive price,** and some industries, such as France or Poland still centre on more artisanal methods and toys.

Europe

Revenue by segments

Average revenue per capita

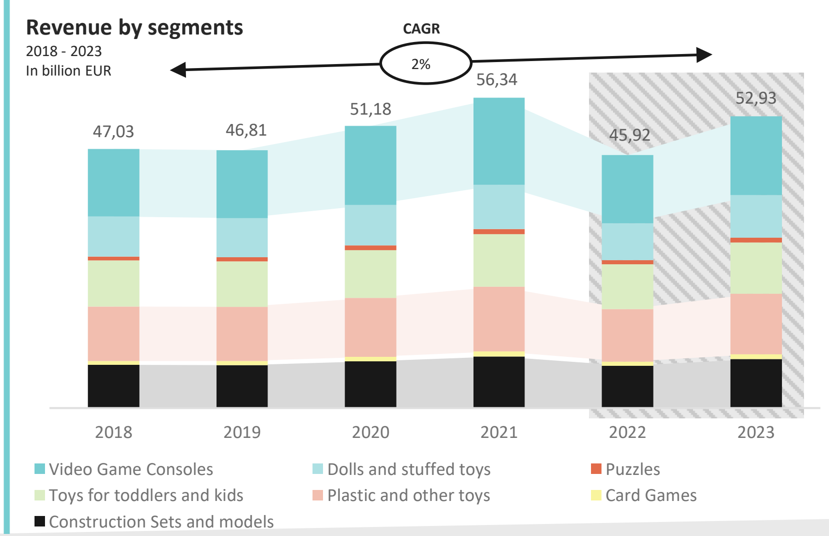
Online sales

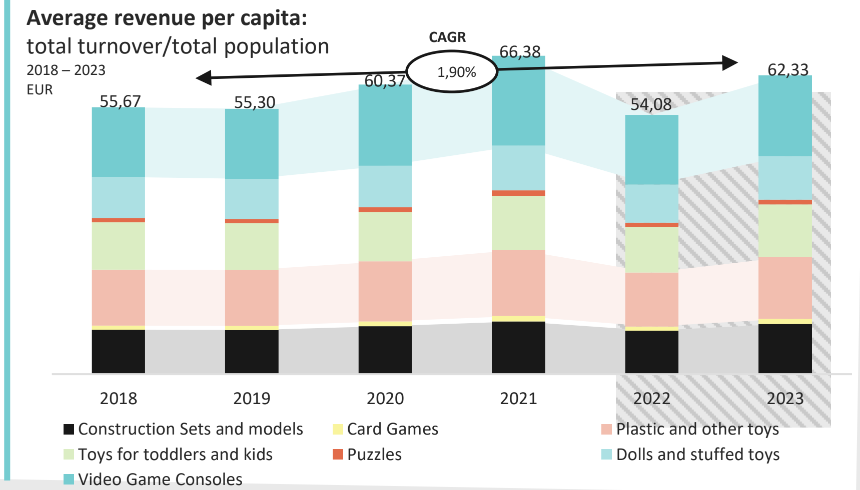
European toys market by segments

The European toy market is the **third-biggest market** in terms of toy sales after North America and Asia. In 2021, the market size was **estimated to be 56,34 In billion EURos.**

The segment of toys that brings more money to the sector are consoles, which have seen an increase in the last years. Meanwhile, puzzles and card games are the lowest revenue figures per year.

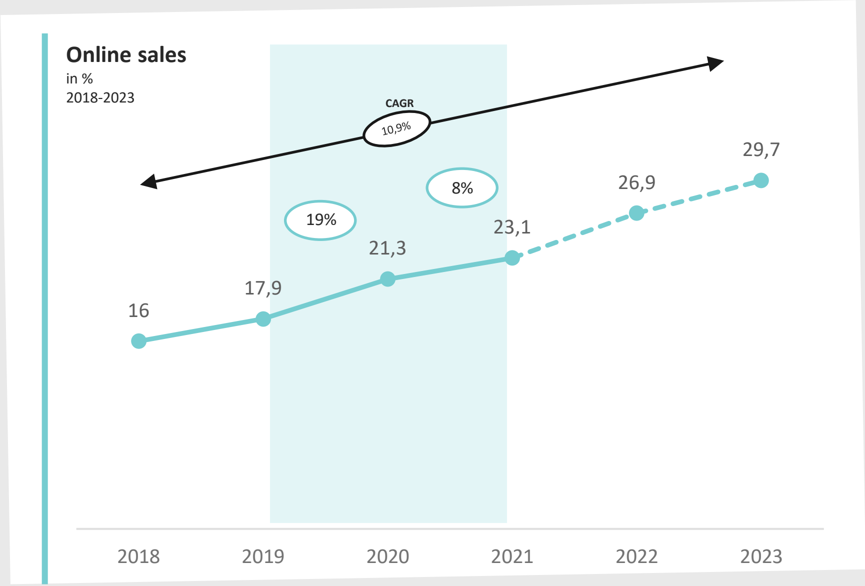
**The data in these graphs is based on information from the 50 current countries in Europe.*





European toys market's consumer behaviour

All European markets recorded a growth in online toy sales in 2020 - 2021. With COVID-19 crisis, new strategies were needed to keep selling, reflected in an increased number of sales via e-commerce.



OVER 1 IN EVERY 4 TOYS IN EUROPE IS **SOLD ONLINE**

5.600 TOY COMPANIES ARE **SMEs**

MOST COMPANIES HAVE **LESS THAN 10 STAFF MEMBERS**

Europe

Videogames deep dive:

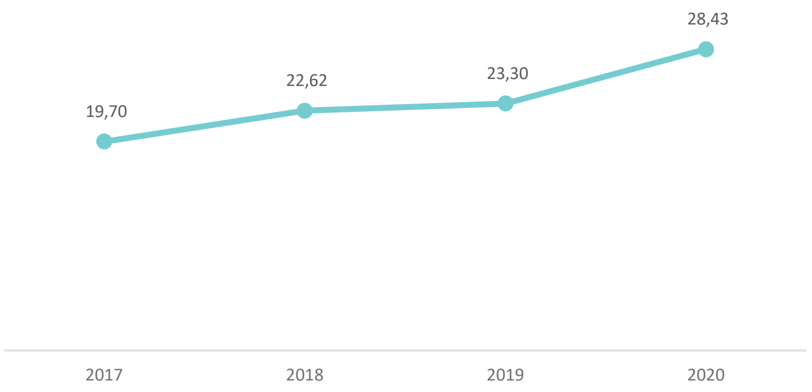
- **Revenue**
- **Devices**
- **Revenue by device**
- **Revenue by turnover**
- **PEGI Games**
- **Gamer’s profile**

European videogames market

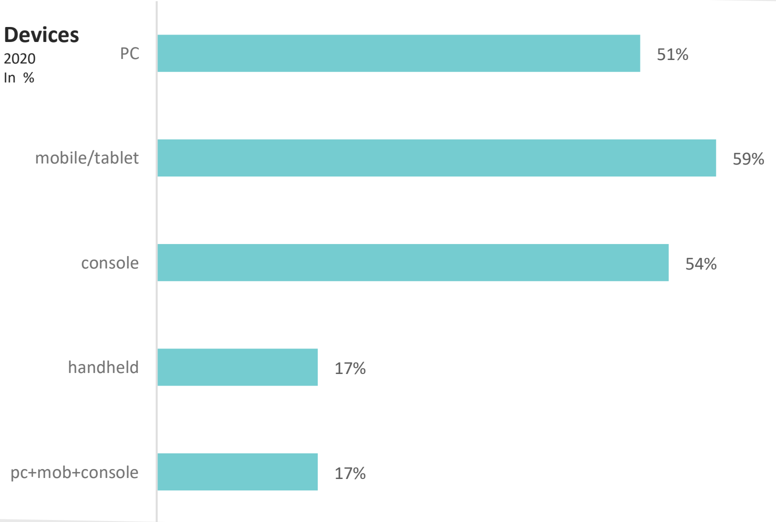
Concerning into the videogame industry and zooming into their data, it can be clearly seen the importance that has gained not only in the general market but in the children's industry within the last years. This increase has led to a growth in the revenue that will keep improving considering the predictability of the tendency.

Considering the device use, it can be appreciated how most children use more than one device for gaming.

Revenue
2017 - 2020
In billion EUR



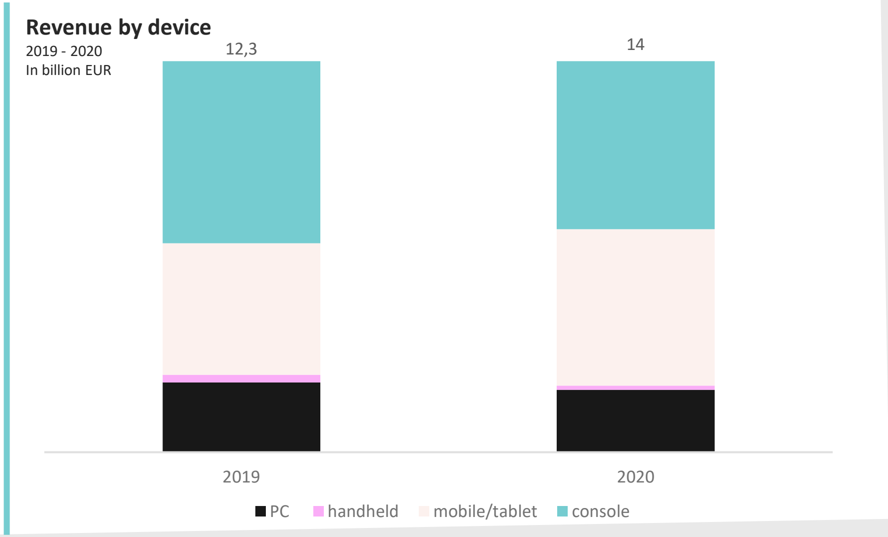
Devices
2020
In %

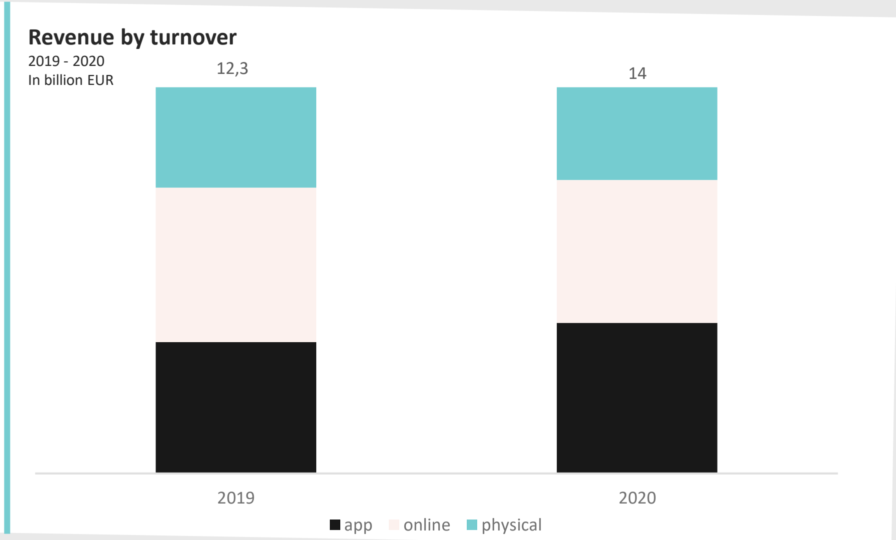


European videogames market

Regarding the *revenue by device*, we can appreciate its growth. The tendencies through 2019 and 2020 have barely changed but let us notice how the mobile and tablet devices may be increasing their presence in the digital market.

The console remains the most used device, but mobiles and tablets are really getting close to acquire the same presence and represent the majority gathering both technological tools.





European videogames market

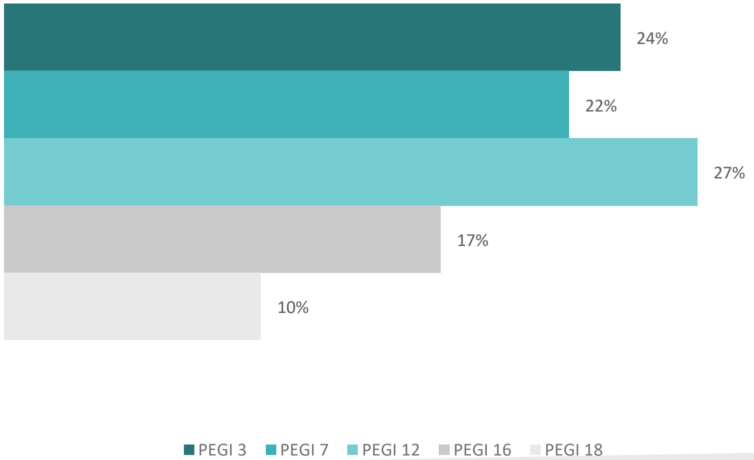
The PEGI (Pan European Game Information) is a European video game content rating system established to help consumers make informed decisions when buying video games. As appreciated, most of the production (73%) of video games, are ranked to be suitable for children under 12.

With reference to that audience, this last year, the 70% of children between 6 and 10 yo assured to play video games. Teens among 10 to 14 figure scales up to an 80%.

PEGI Games

2019

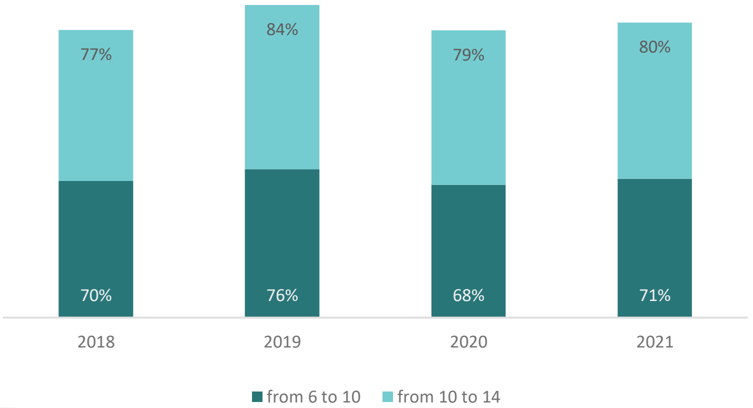
In %



Gamer's profile

2018 - 2021

In %



Spain

Revenue by segments

Average revenue per capita

Online sales

Mobile vs Desktop

Purchase channels

Purchase Drivers

Relevant data

Spain Toys market by segments

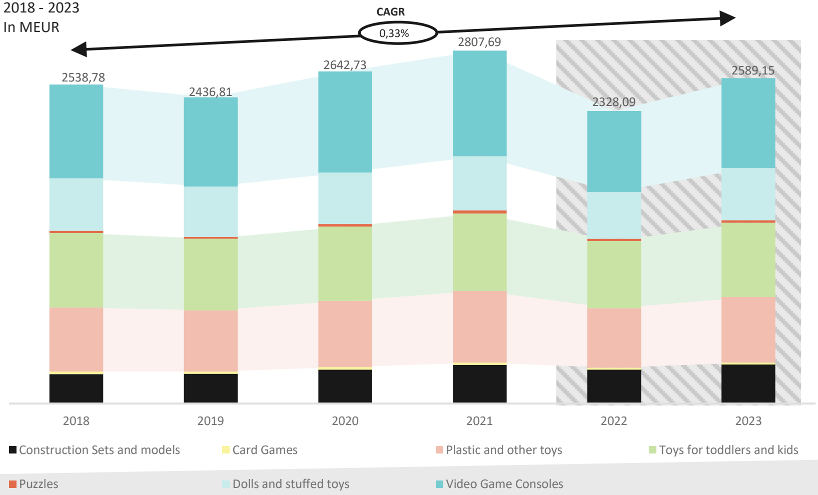
The children's toy market in Spain grew by **6.24% between 2020 and 2021**. In 2021, the total revenue of the sector was **€2807.69 million.**

The market is expected to continue growing by a **0.33% CAGR by 2023.**

Video game consoles is the segment that generate the most monetary value in the sector with a total of **€839,4 million revenue** achieved in 2021.

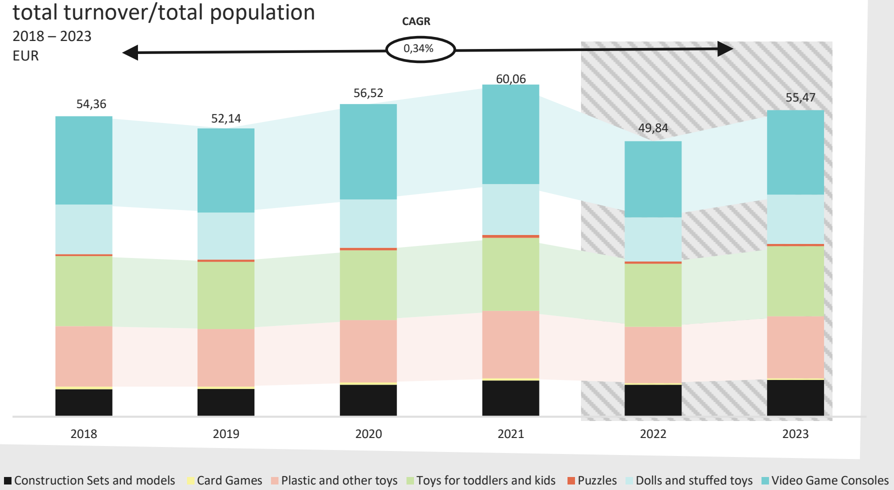
Revenue by segments

2018 - 2023
In MEUR



Average revenue per capita

total turnover/total population
2018 – 2023
EUR

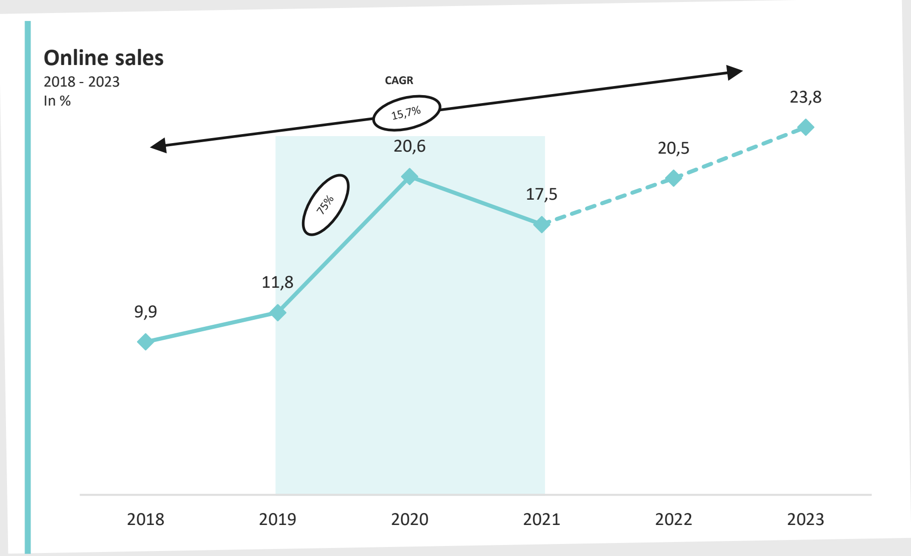


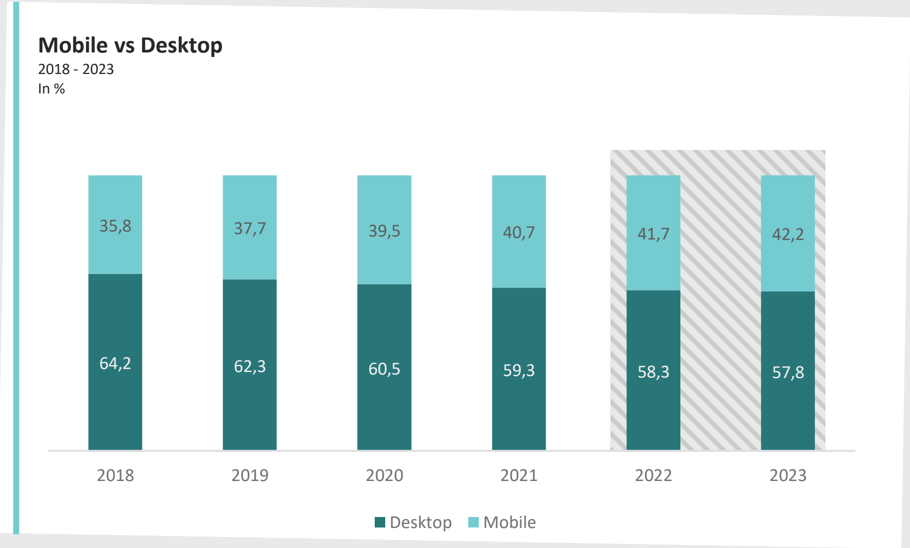
Funded by the European Union

Spain Toys market - Consumer behaviour

The shopper has become more digital by combining purchases in both online channels and physical stores. The toy is still the main gift for children.

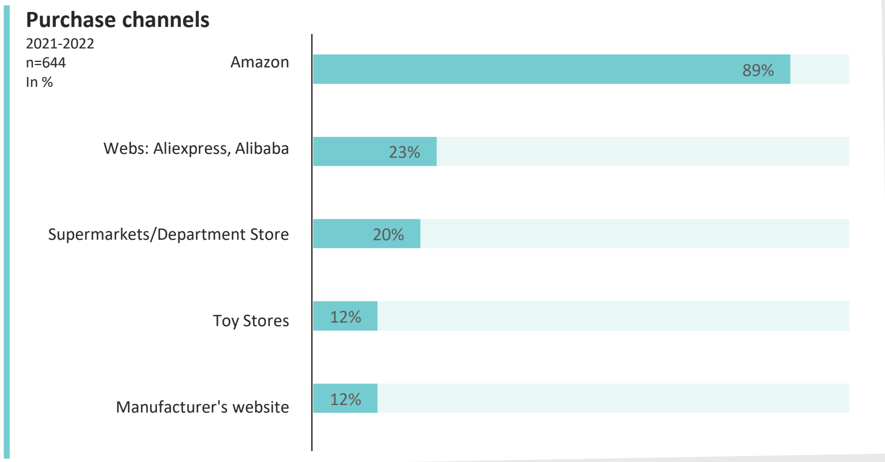
According to a survey conducted to 644 families with children from 0 to 12 years old, the convenience of receiving toys at home, work or wherever you want is the main reason for **buying online (51%),** followed by the fact that **it makes them waste less time (42%)**. The remaining **7% consume toys for other reasons**.

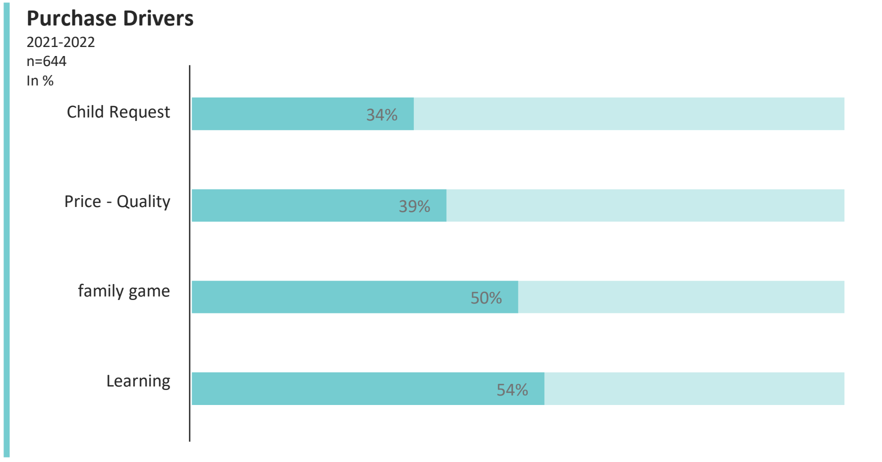




Spain Toys market - Consumer behaviour

Toys remain the main gift for children, followed by children's books and stories, stationery and decorative items. The main factor when choosing which toy to buy is the **children's request (54%)** followed by the "value for money", **encouraging family play (39%)** and **stimulating learning (34%).**





The study proves that **89% of the purchases are done via Amazon,** followed by other online marketplaces such as Aliexpress and Alibaba. On the other hand, specialized toy brand’s websites are the least consumed purchasing channel for parents when buying toys and games for their children.

Spanish Toys market – Relevant data

The following general and interesting data on the Spanish toy market are presented below to help contextualize the rest of the information in this chapter.

65% of companies export part of their production outside Spain.

European markets are the main destination for spanish exports with countries such as Portugal, France, Italy and Germany leading the way.

Behind the European borders, Russia, Mexico and the United States are three of the most representative markets in the sector.

The spanish toy sector includes a large number of companies whose activity is increasingly oriented towards:

- a product of **high design**,
- **quality**
- **pedagogical values**,

in order to compete in international markets where the price factor is decisive.

The census of manufacturers in 2019 was made up of **243 companies**.

These companies directly employ more than **4,800 people**, (more than 20,000 indirectly).

France

Revenue by segments

Average revenue per capita

Online sales

Relevant data

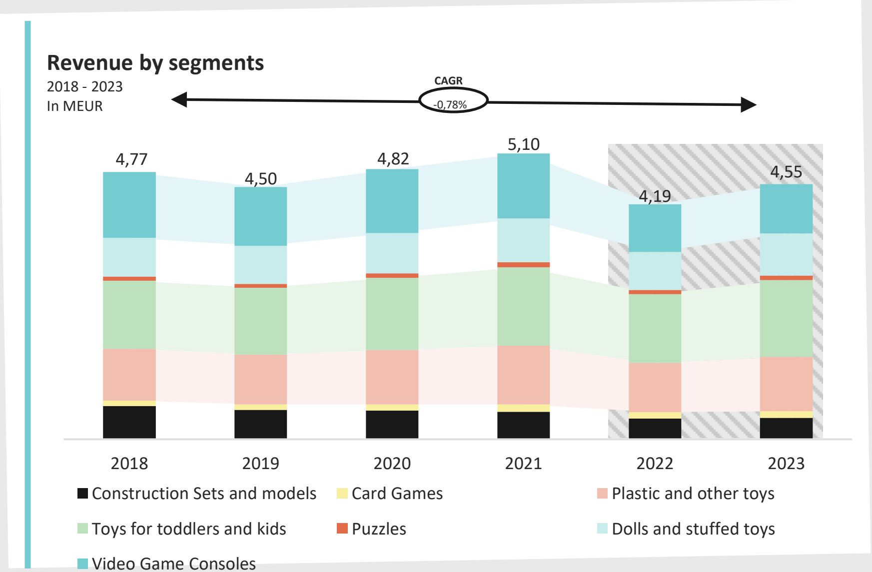
Funded by the European Union

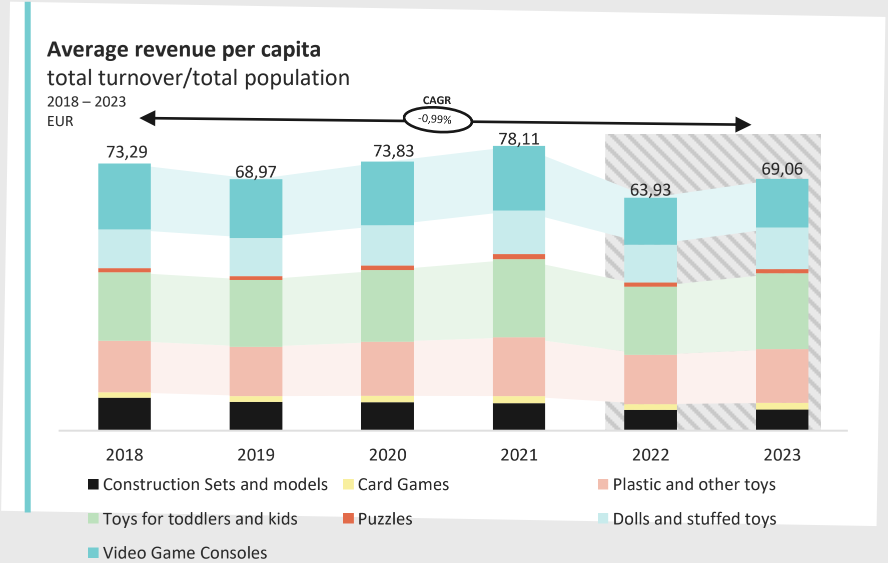
French Toys market by segments

The French market for games and toys ranks fifth in the world and second in Europe, behind the United Kingdom and ahead of Germany.

In 2021, the national market had a turnover of **5.10 million euros** and an average per capita revenue of **€78.11.**

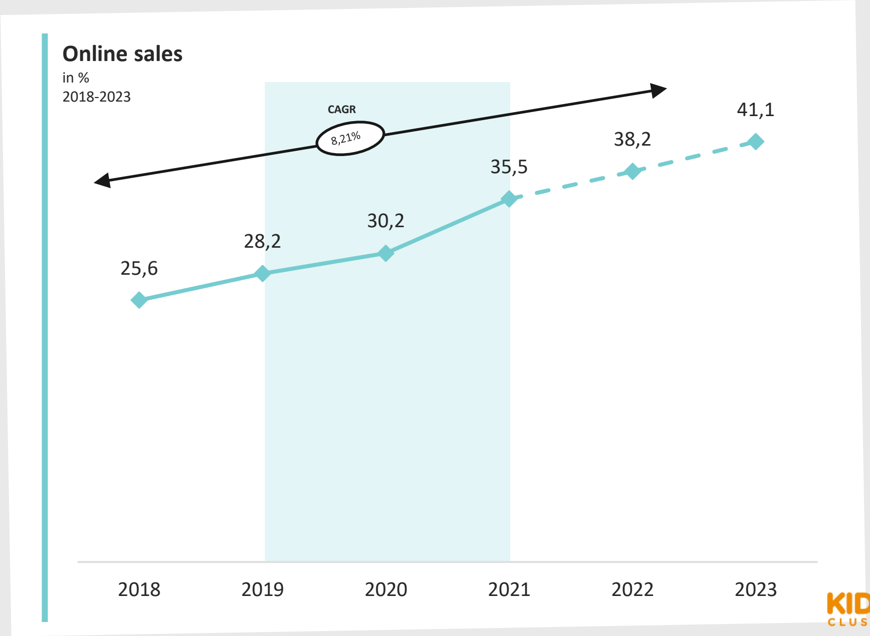
Console video games, toys for young children and plastic toys are the segments that generate the most money in the market.





French Toys market - Consumer behaviour

In France, the rate of consumption of toys through online sales channels is very high compared to other countries of the studio. In 2021, it accounted for **35.5% of total toy sales** in the market.



New purchasing channels

In France, most toys are sold at offline outlets. Thus, within the offline channel, the main distribution channels are still hypermarkets and supermarkets, and specialized toy stores.

However, with the evolution of time, **online toy sales multiply**, thus increasing the market share in France.

In addition, most retail chains and manufacturers have begun to invest in online retail (e-tailing), and most of them have websites for sales.

French Toys market – Relevant data

The following general and interesting data on the French toy market are presented below to help contextualize the rest of the information in this chapter.

The toy market in France is domestically produced by small, medium and large manufactures and renowned international brands.

It is important to know that "**Made in France"** continues to grow and now accounts for 14% of total sales (+2.4%), and games to play as a family are really booming, accounting for 20% of total sales.

The French market is full of a wide range of traditional and modern toys. However, there has been a shift from conventional toys to innovative, high-tech electronic toys with evolving trends.

The toy industry faces increased competition from online gaming and the recent trend in tablets and smartphones for online entertainment purposes.

According to Statista there are **689 toy producers** in France as of 2021.

The number of retail stores selling toys and games is **1,990** and the number of companies creating and publishing electronic games amounts to **809**.

It is a sector that is still composed mostly of **SMEs (60%**) and where an artisanal character and specialties such as wooden toys, educational and social games usually predominate.

Italy

Revenue by segments

Average revenue per capita

Online sales

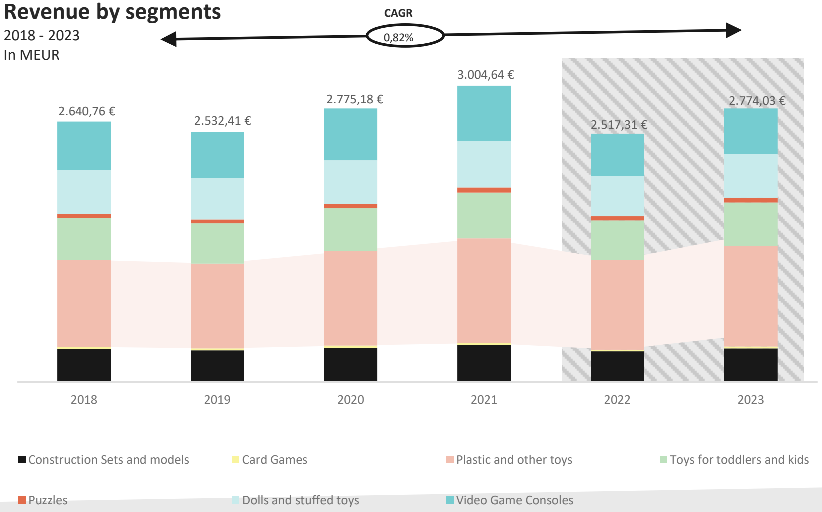
Italian Toys market by segments

The toy sector in Italy closed the year 2021 with an increase of **8,27%** compared to the year 2020 and has exceeded by a **18,64%** the figures of 2019, the pre-pandemic year. In 2021, the total income generated by the national market for Italian toys was **€3,004.64million**.

Among the segments that contribute the most in the sector in terms of revenue, are **plastic games, toys for young children and video game consoles**.

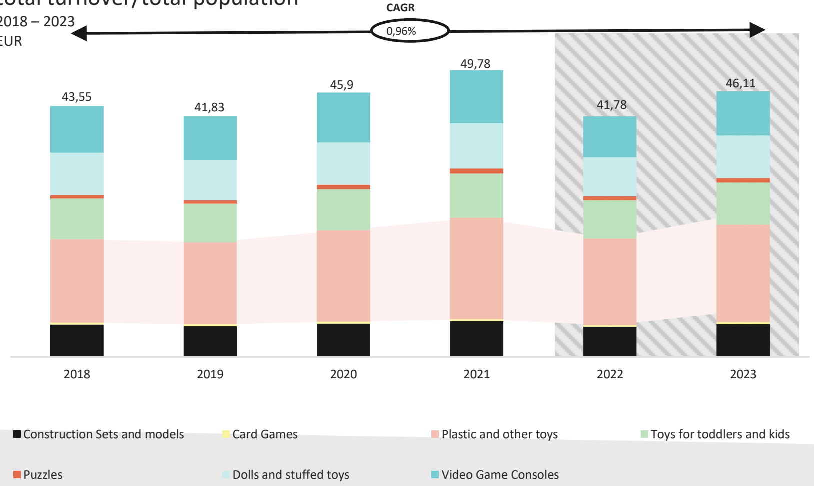
Revenue by segments

2018 - 2023
In MEUR



Average revenue per capita

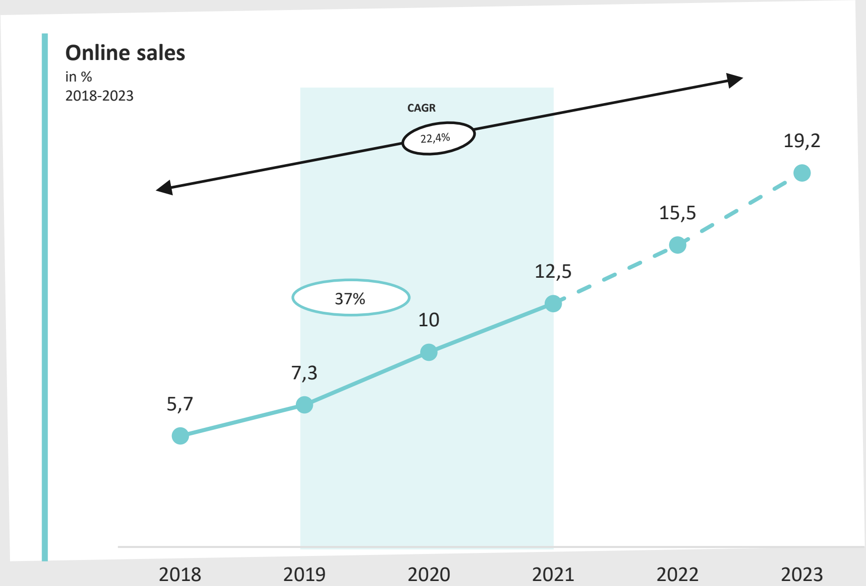
total turnover/total population
2018 – 2023
EUR



Funded by the European Union

Italian Toys market - Consumer behaviour

As in the rest of the European countries analyzed, the consumption and purchase of toys online grows from year to year. Between 2019 and 2021, the growth of toy purchases by online means grew by **up to 22%.**



New purchasing channels

Hypermarkets, supermarkets and stores of the highest proportion of sales in the Italian toy and games market in 2021.

Nevertheless, online sales accounted for **12.5%** of the total market value in 2021.

Growth in this market has been limited to some extent by the increasing prevalence of digital toy alternatives, including game consoles, tablets, and mobile phone apps.

Denmark

Revenue by segments

Average revenue per capita

Online sales

Relevant data

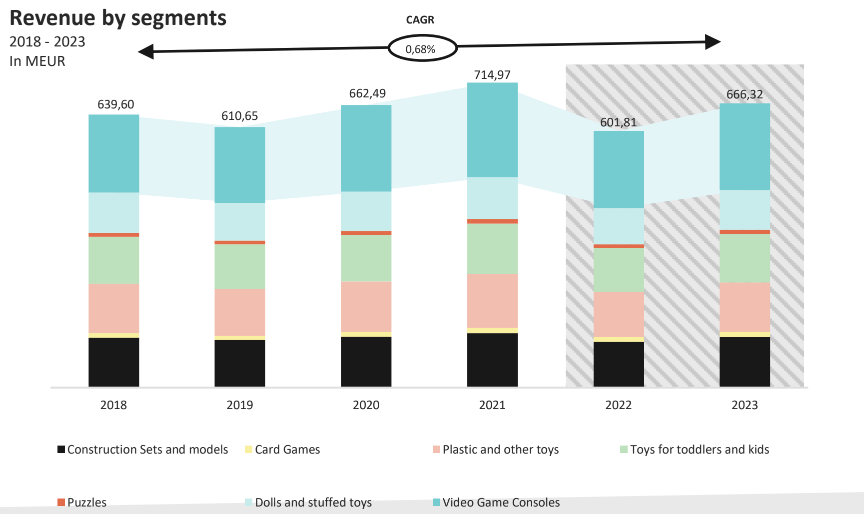
Funded by the European Union

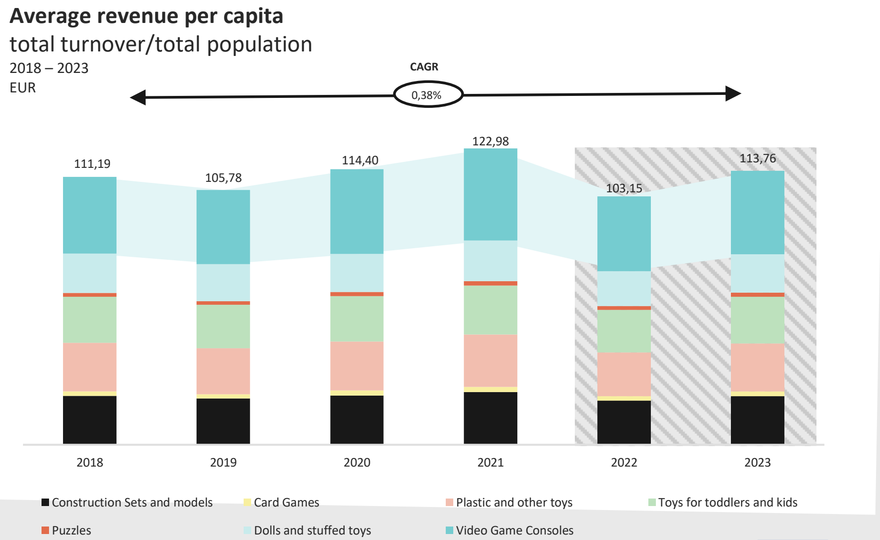
Danish Toys market by segments

By 2021, the total income generated by the toys sector was **€714,97million.** Taking into account the small size of the country, a high rate of toy revenue is observed.

Between 2020 and 2021, the sector's revenues increased significantly **(7,92%).**

In the sector, the video game consoles it is the segment that generates the most money and is followed by plastic toys and construction sets and models.

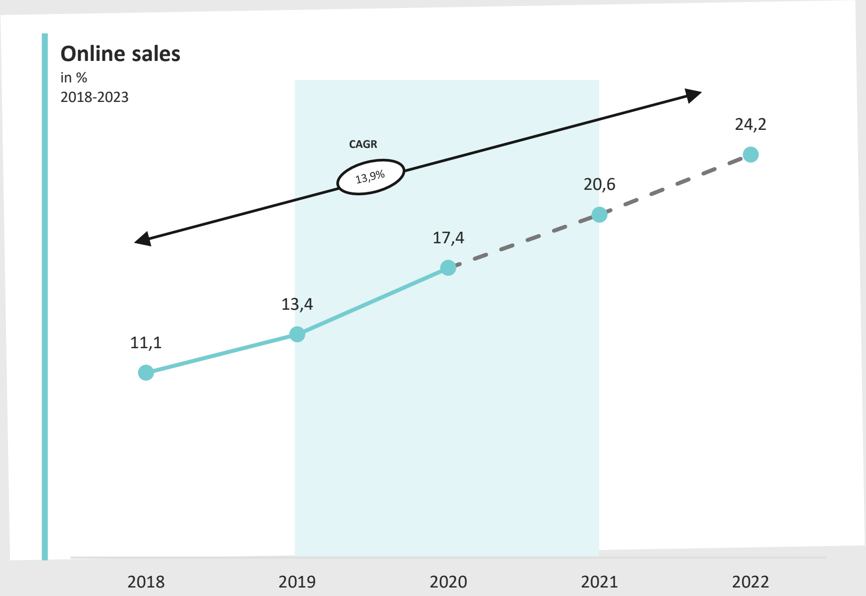




Danish Toys marke - Consumer behaviour

The online trade of games and toys, as in the rest of the countries analyzed, is experiencing a growth. In the case of Denmark, the trend of buying games and toys online increases by **15.7% from year to year**, a percentage higher than the CAGR of other important countries in the industry such as France or Germany.

New purchasing channels



Regarding Danish consumers, they are demanding and there are many aspects that they take into account when making their purchases on the Internet: saving time, ease of the process, easily comparing prices and characteristics of the products, being able to acquire products that otherwise they could not acquire. In addition, it is noteworthy that **82%** of Danish consumers are concerned about sustainability in their online purchases and **43%** would not mind paying more for reduce your carbon footprint. In recent years, e-commerce through mobile phones (m-commerce) or other devices other than computers have grown substantially in Denmark.

Danish Toys market – Relevant data

The following general and interesting data on the Danish toy market are presented below to help contextualize the rest of the information in this chapter.

The demand for toys in the Danish market is highly conditioned by the country's **high per capita income**. In this way, Denmark is a strategic objective of a large part of the companies of all the countries that have as a priority objective the foreign markets.

Denmark is a net importer of toys. The size of the Danish toy market is mainly defined by the volume of its imports.

Sweden and Norway have been the main destinations for Danish toy exports

Generally speaking, the Danish consumer is very demanding, used to to high levels of quality, and to demand it when he does not find it, specially regarding sustainability.

Thus, despite their **high price sensitivity** and the fact that they pay more and more attention to discount stores for everyday consumer goods, they still maintain a great **interest in quality**.

Denmark has around **140 toy producers**, including LEGO, the most important toy manufacturer in Europe.

Most of the rest of the Danish toy manufacturers are **small companies** that manufacture different types of products.

Germany

Revenue by segments

Average revenue per capita

Online sales

Relevant data

German Toys market by segments

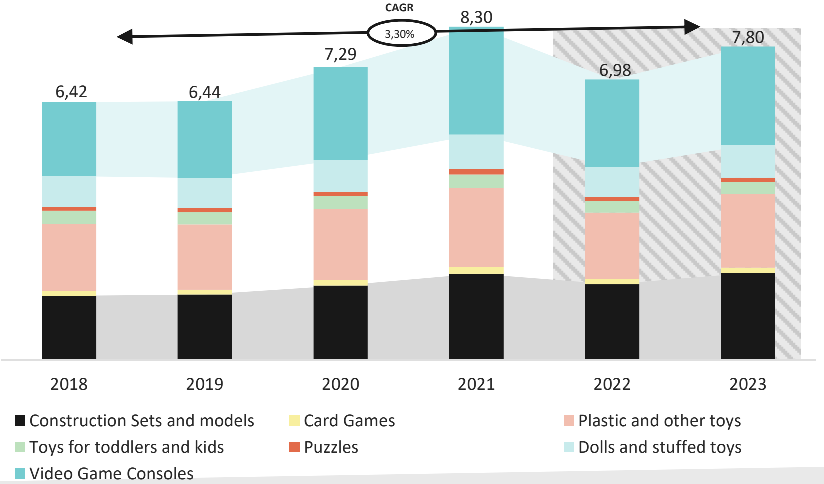
The German toy market, with the different segments that make up it, presents a not very significant but constant growth since 2018. In 2021, the market value was up **to 8.30 billion**. The market is expected to grow annually by **5.85% (CAGR 2022-2026).**

In terms of revenue, construction sets and models, videoconsoles and plastic & other toys are the types of games that bring more money to the sector. However, the average revenue per capita for these segments is higher than the other segments.

Revenue by segments

2018 - 2023

In billion EUR

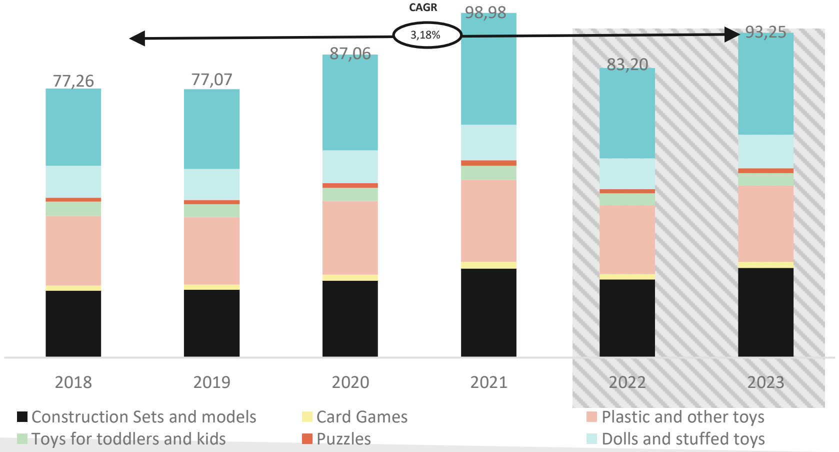


Average revenue per capita

total turnover/total population

2018 – 2023

EUR



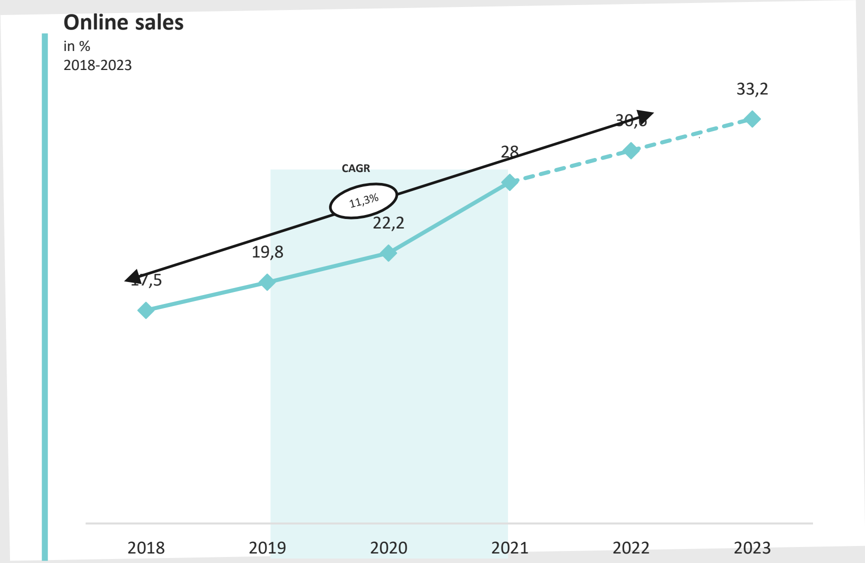
Funded by the European Union

German Toys market - Consumer behaviour

E-commerce allows customers to compare different brands and then buy the products.

This is compelling the German manufacturers to focus on **online selling of the toys and games** according to the age group. As in many other industries, the rapid rise of e-commerce and online shopping has influenced German consumers' buy toys.

As many consumers more frequently purchase toys on the Internet, this distribution channel has grown disproportionately, although compared to the total market, its growth is slower.



New purchasing channels

The share of online commerce in total turnover is growing. The vast majority of modern businesses are active on the Internet, through a professional **online store** or with a **presence on social networks.**

In many cases, the online presence acts as a driving channel to the premises, since customers use this service to know the hours of operation and to receive advice, they visit the businesses directly.

German Toys market – Relevant data

The following general and interesting data on the German toy market are presented below to help contextualize the rest of the information in this chapter.

In terms of geographical distribution, Germany, Italy and Spain clearly appear as the largest toy industries in Europe.

Germany is by far the **largest producer in terms of employment and turnover** as it accounts for a quarter of all staff employed in the EU toy industry.

In the specific case of German children, there is a clear inclination to the **use of sustainable toys.**

The materials used for the production of the toy are also relevant for the consumer in this market when making the purchase decision.

According to Statista there are **689 toy producers** in Germany as of 2021.

Despite the continuous increase in sales in the German toy trade, the toy retail trade is now more than ever in danger of extinction.

This was also exacerbated by store closures in times of pandemic. Between 2015 and 2020, **one in four retailers had already closed** their business.

Poland

Revenue by segments

Average revenue per capita

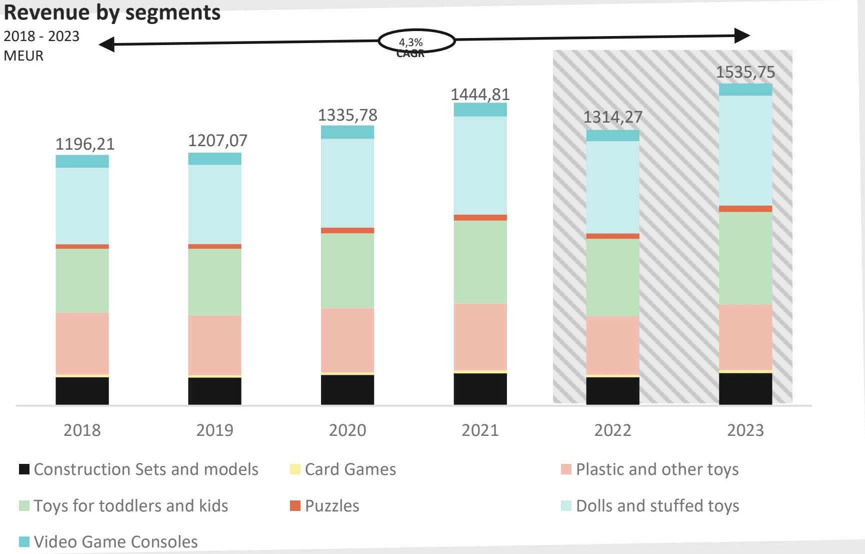
Online sales

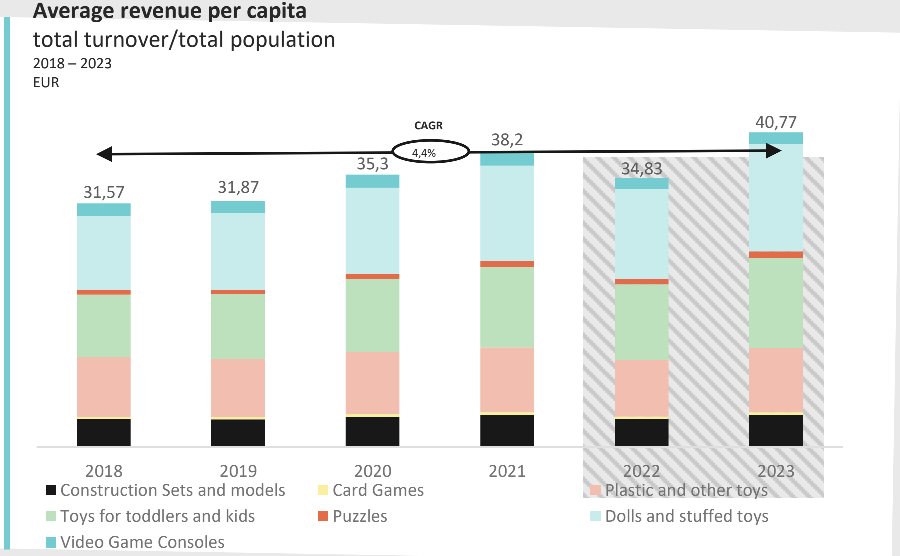
Relevant data

Poland Toys market by segments

The size of the toy market in Poland is worth **€ 1.444,81 million (2021)**. Although it is a smaller size than that of other central European countries, a great potential can be appreciated due to **its high growth rate, .**

Due to an increase in the number of births in the last years, a fastest growing consumption is identified. In terms of revenue, plastic and other toys and dolls & stuffed toys are the segments that bring more monetary value to the market.





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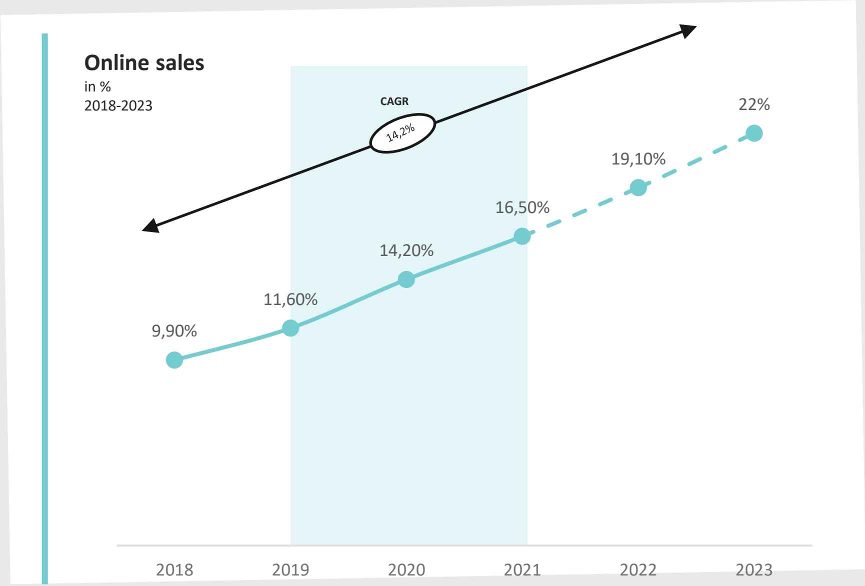
Poland Toys market - Consumer behaviour

Purchases of toys in Poland are mostly made in physical stores and specifically in specialized stores, which include the sale of toys but also of other leisure items such as books and music. Despite this, online commerce is growing at a good pace partly as a result of the health crisis that has led companies to invest in online distribution channels, **representing a 16% of the total sales.**

The consumption of online toys in Poland is experiencing exponential growth. Especially between 2019 and 2020, a growth of 22% standed out with respect to sales in physical channels.



Specialized stores (2021)
69%

Large markets surfaces (2021)
15%

Online purchases (2021)
16%

Poland Toys market – Relevant data

The following general and interesting data on the Polish toy market are presented below to help contextualize the rest of the information in this chapter.

Poland exports toys mainly to Germany (310 million euros in 2020) with almost **30% of the total exported**.

It is followed by the Czech Republic and the United Kingdom. The vast majority of Polish toy exports are made to countries of the European Union.

The polish toy sector includes companies whose activity is increasingly oriented towards:

- Educational toys
- Interactive toys
- Toys with pedagogical values

In 2019 the local production of the toy industry was approximately 206 million euros.

There is a high concentration of the sector since **67%** of this was produced by 16 companies.

Slovakia

Revenue by segments

Average revenue per capita

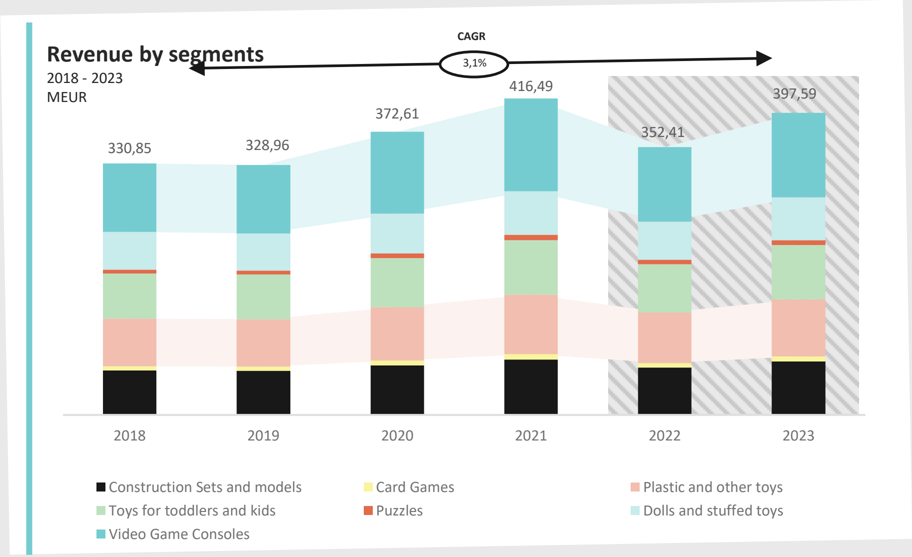
Online sales

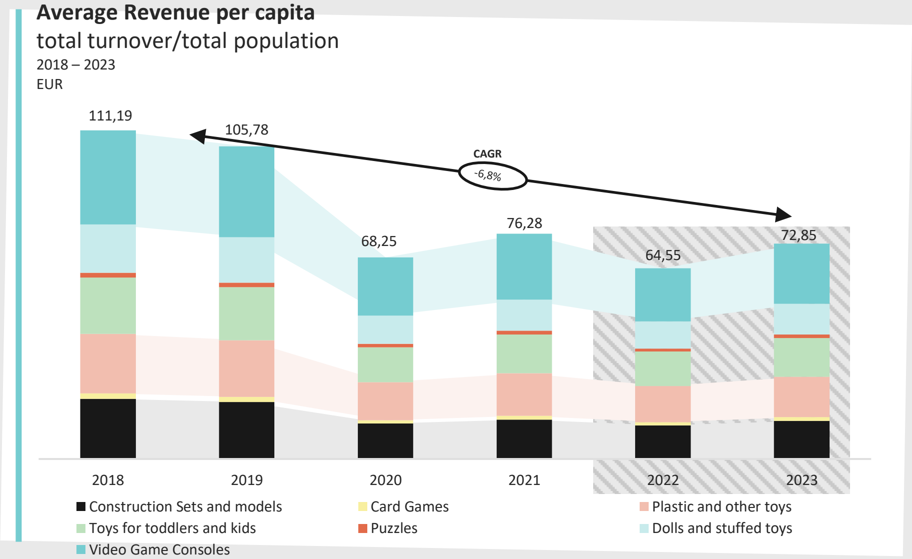
Slovak Toys market by segments

Slovakia's toy sector, compared to other countries analyzed in this study, generates fewer revenue. In 2021, the revenue was **€416,49** million.

Even so, it should be noted that growth from 2018 to 2023 is expected to be **3.1%, percentage of positive CAGR**, reaching over **415 MEU**R in 2021.

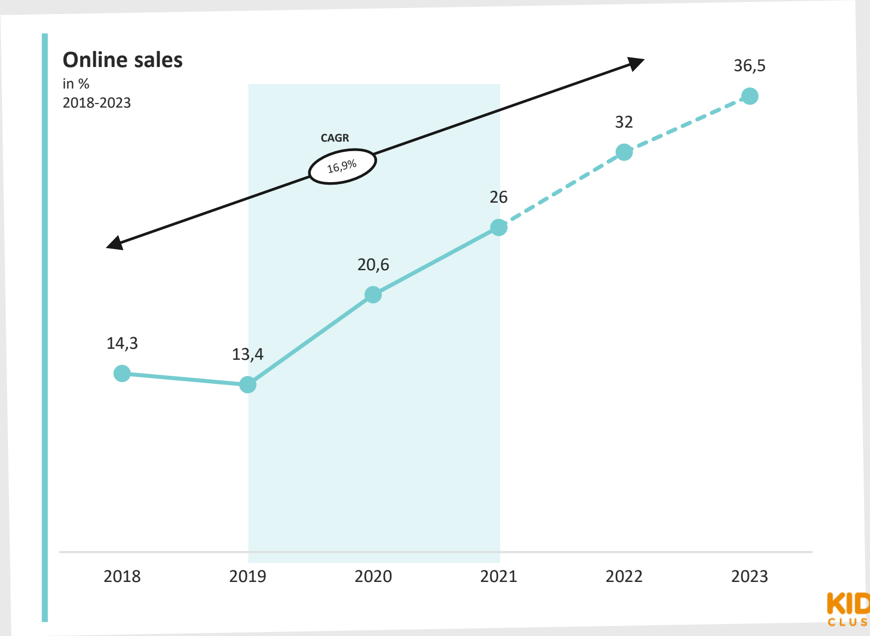
Specifically, the segments that bring more value to the market are video game consoles, while puzzles and card games are the categories that generate the least income. In these last two types of products, it is seen that their average revenue per capita is low, which can help to deduce that the price per unit of these is also low.





Slovak Toys market - Consumer behaviour

Purchases of toys through online sales channels, as in the rest of the countries, are increasingly frequent in Slovakia. In 2021, **26% of the total sales** made in the toy sector will be made through online channels, either through computers, tablets or mobiles.



New purchasing channels

It should be noted that Slovakia, despite its small size and population, is the country analyzed, after Italy, which experiences the highest sales growth through e-commerce and online channels.

In this case, there is a year-over-year growth of **16.9% (CAGR).**

It is expected that by 2023 36.5% of the total sales of the sector will be made through online sales channels.

2.2.2. Child Clothing

The Child Clothing market covers apparel for boys and girls up to the age of 14. Clothes for babies and toddlers are separately displayed in the Baby Clothes segment.

2.2.2. Child clothing

Key findings

The European **children's clothes market** is a **high-value and growing** market.

- The market size in 2021 was estimated at **50,18 In billion EURos and 11,369 billion pieces sold.** Even though the yearly increase in the number of children in Europe is very slow, the market for children's wear is expected to grow in revenue at a much higher rate of approximately 1,40% per year.
- The 7 countries we have analysed in depth represented **almost 44% of the overall European children's clothes market in 2021**.
- Within the markets analysed, **Germany, Italy and France** have the largest markets in terms of revenue, followed by **Spain and Poland**, and finally by **Denmark and Slovakia.**
- The size of the **Italian market and the Danish market is significant** in comparison to their population and the volume of their markets in other categories. Their revenue per capita or per child are much higher than the average in the region.
- **Slovakia and Poland are the countries with the largest expected CAGR** (3,9% and 3,8% respectively), while **the Spanish and Italian markets are expected to decrease** by -1% CAGR 2018-2023.
- Relevant sub-categories include **baby clothes and trousers**, with the largest revenue, and **underwear and nightwear** with the largest volume. In general, **the weight of the different categories in the market remains stable** across the years.

Funded by the European Union

2.2.2. Child clothing

Changing needs & attitudes

- The clothes industry experienced a dip in revenue in 2020 due to the socioeconomic context of the pandemic, but it is slowly expected to recover consistently across the region.
- **Price points are consistently growing** in the last few years across different product categories in most analysed markets (except Poland), with **manufacturers and new brands increasingly focusing on quality** to compete in a very competitive fast fashion market.
- In consequence, although the **per capita expenditure** across the region has also decreased in general (especially in Spain) it is nevertheless expected to recover in the next few years, growing 1,3% CAGR 2018-2023.

Funded by the European Union

2.2.2. Child clothing

Significant trends

Ecommerce

- Children's clothes shoppers have become more digital by combining purchases in both online channels and physical stores, with a higher influence of online sales than other analysed categories.
- All European markets have shown a significant growth in online sales, which accelerated in 2020 due to the COVID-19 crisis. **Currently, 30% of children's clothes sales in Europe are online purchases.**
- France and Germany have the highest percentage of online toy shoppers (37,9% and 28% in 2021 respectively).
- Online sales grew by 23% in the region due to COVID, but some countries experienced very significant growth: 48% in Slovakia, 40% in Spain or 27% in Poland.
- The share of mobile purchases compared to desktop purchases for online children's clothes sales was 45,5% in 2021 and is expected to keep growing in the next few years, almost to an even split.

Sustainability

- The clothes industry has also been influenced by consumer demands towards more sustainable and eco-conscious values.
- The share of sustainable apparel in the region is 5,4% of the market, with similar figures across the different countries. The countries where consumers are more eco-conscious consumers are Denmark, France and Germany.

Europe

Revenue by segments

Average revenue per capita

Volume by segments

Sustainable apparel share

Online sales

Mobile vs Desktop

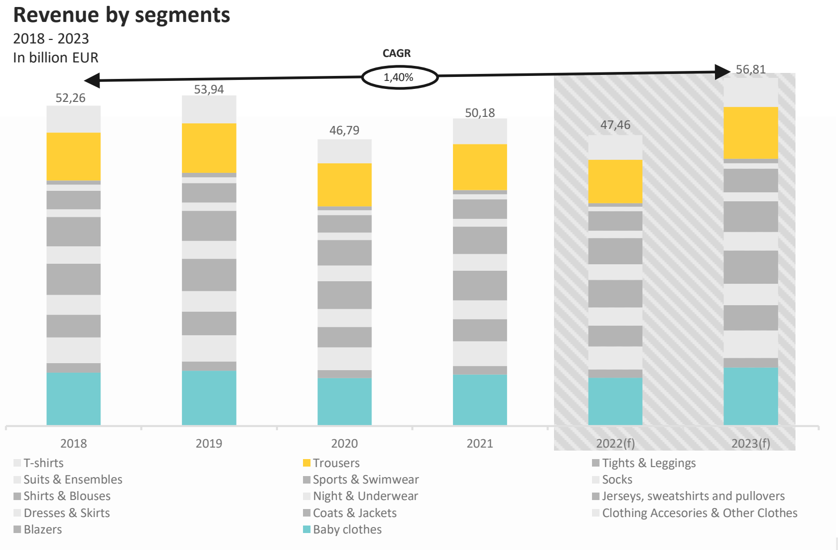
Price per unit

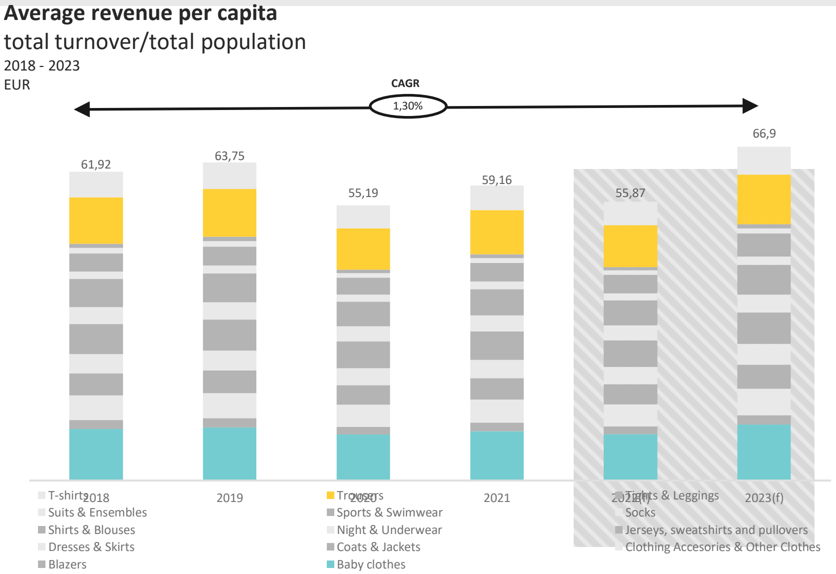
European Child Clothing market by segments

In 2021, the total worth of the European children's clothing market was estimated at **50,18 In billion EURos** and the annual average revenue per capita is approximately **€59,16**. Although child clothing's revenue per capita was lower compared to other years, it is increasing by **1.30%** from one year to the next, since 2018.

Babyclothes and trousers are the two segments that bring the most revenue to the sector.

**The data in these graphs is based on information from the 50 current countries in Europe.*

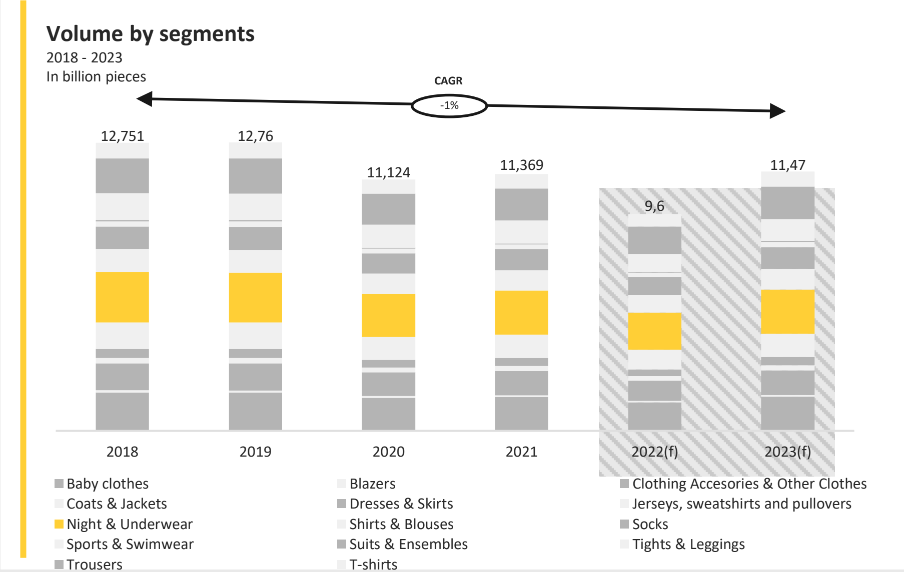


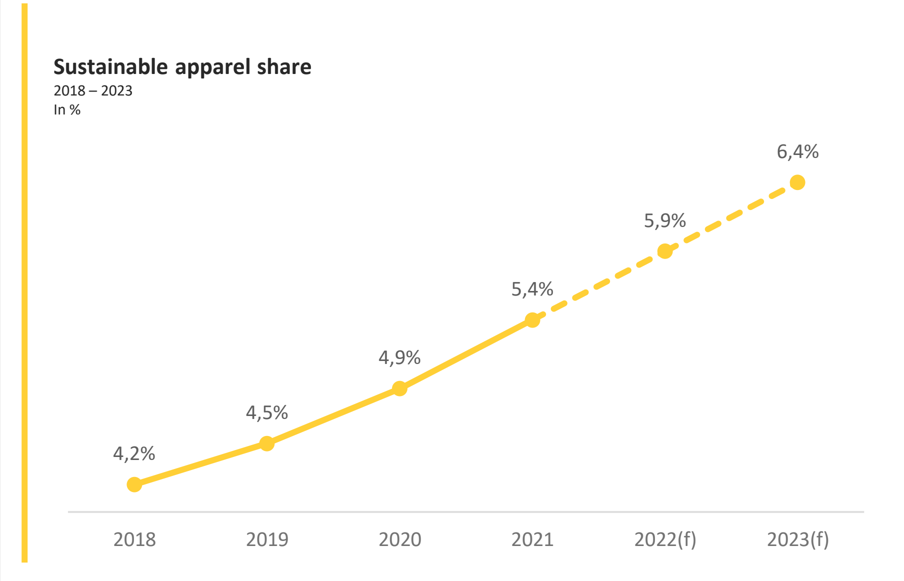


European Child Clothing market by segments

In Europe, the child clothing segment that stands out by volume produced, which means that it is the best seller, is underwear and night wear, representing a total volume of **1.943,6 sold million pieces in 2021.** However, the price per unit of this category is low compared to others.

As the graph on the right shows and as the following chapters from each of the countries analyzed will demonstrate, there is a growing and general trend in buying sustainable children's clothing items that in 2021 accounted for **5.4% of total purchases** in this sector.



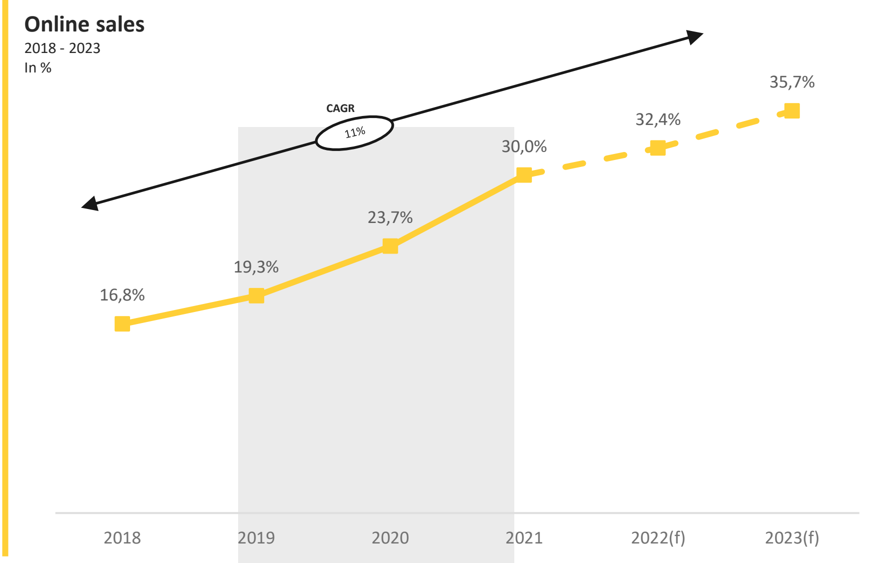


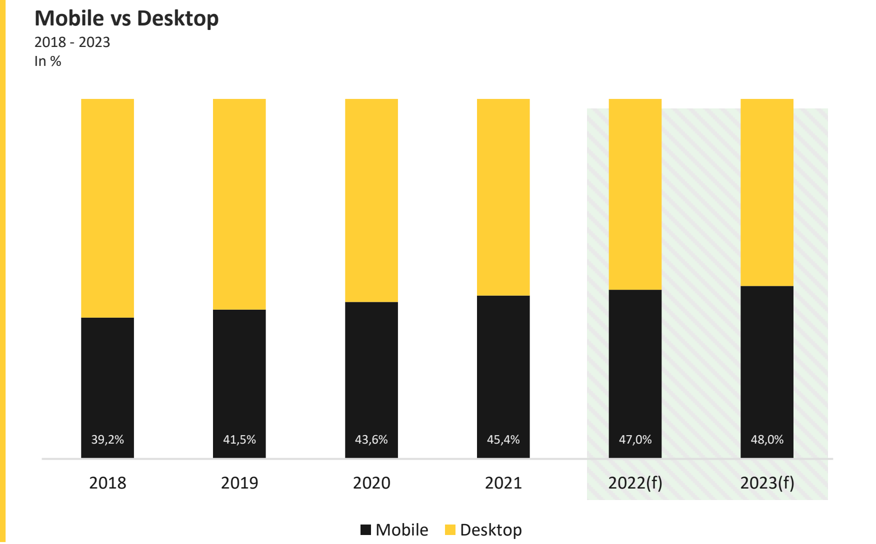
European Child Clothing market – Consumer Behaviour

At the European level, digitalization in the purchase of children's clothing also stands out as a trend to highlight. Between 2018 and 2023 it is expected to grow in a **11% CAGR**.

In 2021, online sales of child clothing accounted for **30% of total sales** in the sector, a number that shows the high potential of this new purchasing model. A 45,5% of this online sales were made by mobile phones while the rest was conducted by desktops.

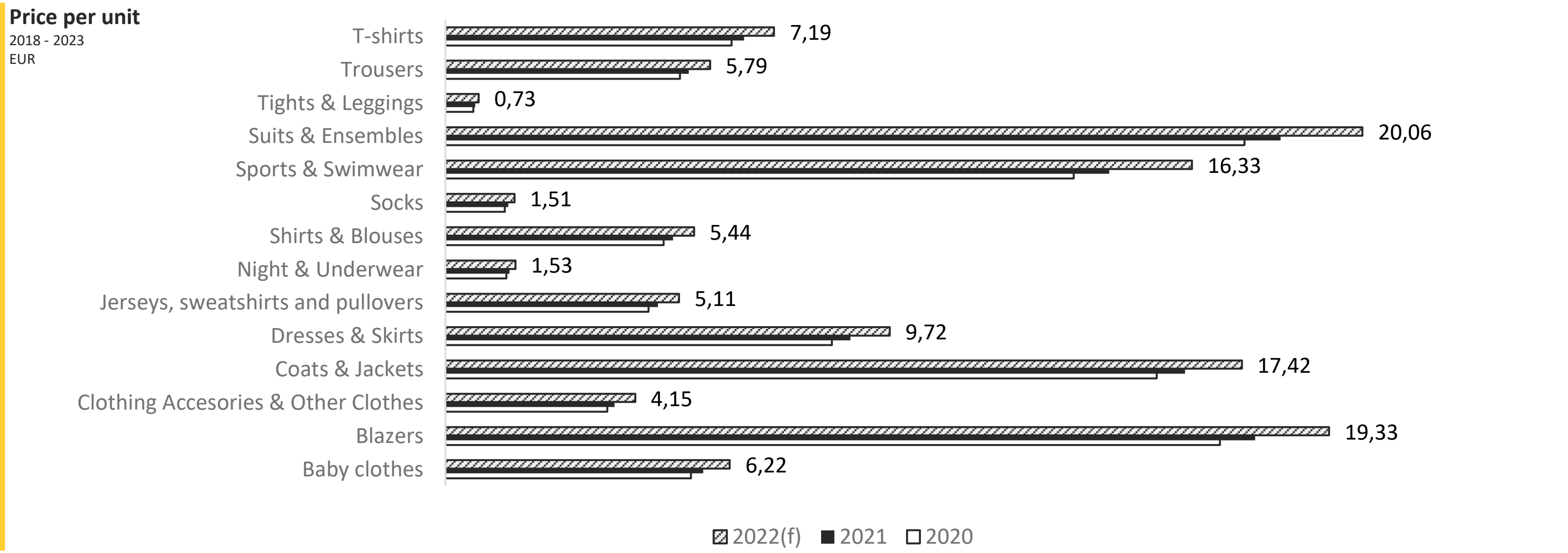
It is expected that the use of mobile applications will predominate in online children's clothing purchases over purchases via computers in the future.





European Child Clothing market by segments - Price per unit

Overall, children’s wear is a high-value market in Europe and shows many opportunities for easy market entry. Especially the market entry into fast fashion products appears very simple, while entering exclusive product lines can be significantly more difficult. To achieve the latter, manufacturers must prove their products are of high quality. For this reason, the prices of the sector increase at a general level since 2020 in all market segments. The most expensive pieces of children's clothing are **suits and ensembles** and **blazers** while **socks** and **evening and underwear** remain as the cheapest segment.



Spain

Revenue by segments

Average revenue per capita

Volume by segments

Sustainable apparel share

Online sales

Mobile vs Desktop

Price per unit

Spanish Child Clothing market by segments

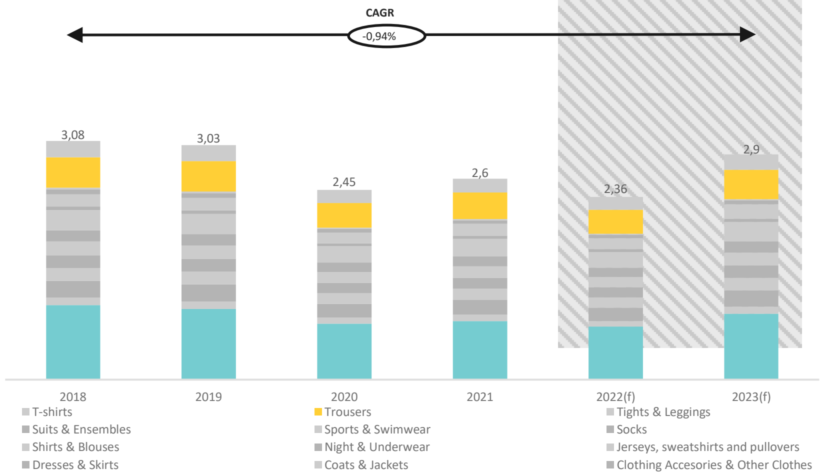
The Spanish children's clothing market is expected to decrease slowly and remains an interesting market due to its size. The average annual revenue per capita on children's clothing decreases approximately **5,18 %** and per year, resulting in a total market value of **€2,6 billion** in 2021. Total market revenue is also expected to decline in the coming years.

The segments that generate the most money in the sector are trousers and baby clothes.

Revenue by segments

2018 - 2023

In billion EUR

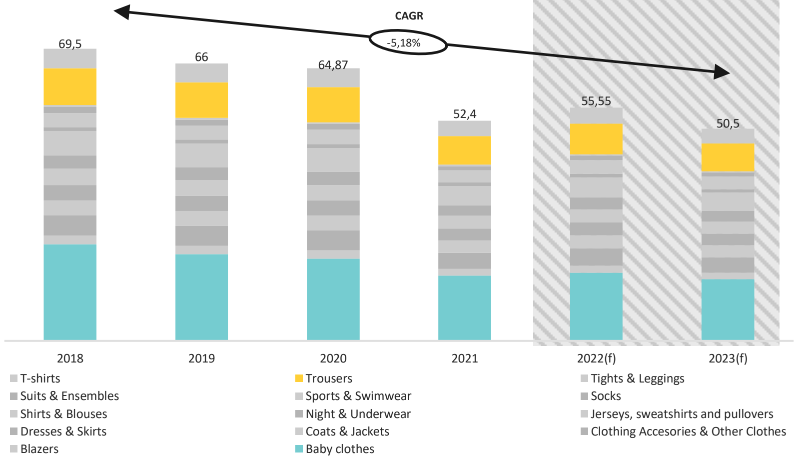


Average revenue per capita

total turnover/total population

2018 - 2023

EUR



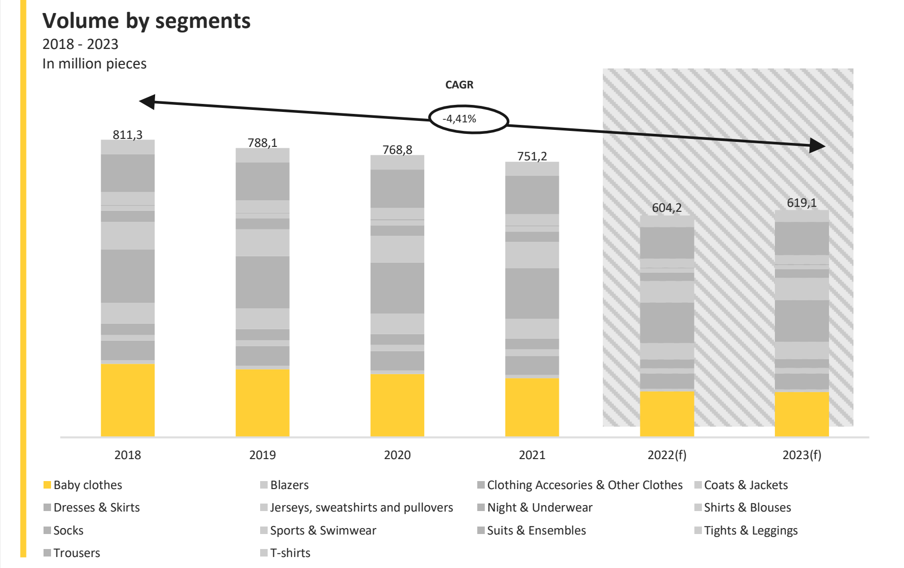
Funded by the European Union

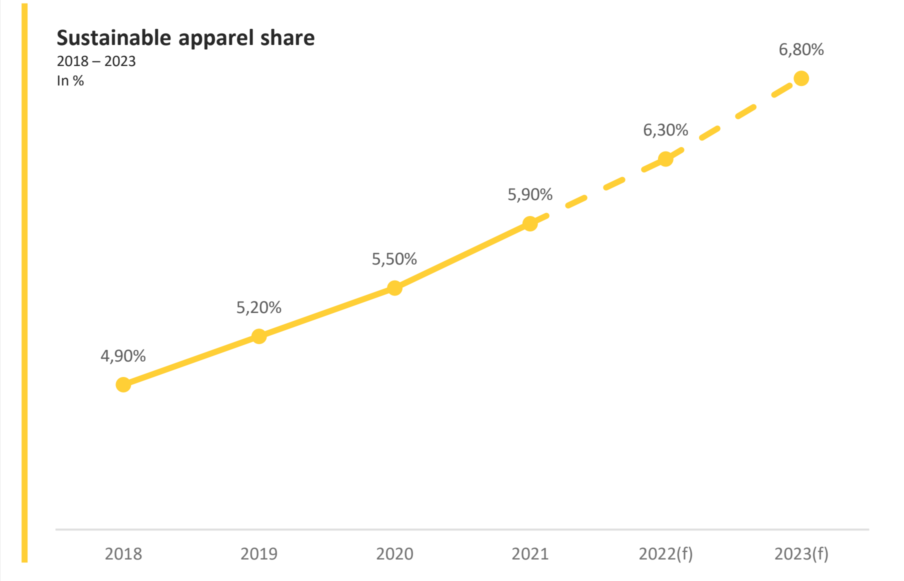
Spanish Child Clothing market by segments

The baby clothes segment, at the same time being the segment that brings more revenues to the sector, is also the one that represents a greater volume in terms of articles sold.

From a general point of view, the Spanish production of children's clothing is expected to decrease in sales by 2023, with a negative **CAGR** of **4.41%.**

Even so, it is expected that this production will lean towards a more sustainable production and that the percentage of ecological and recyclable articles will continue to grow in the coming years.



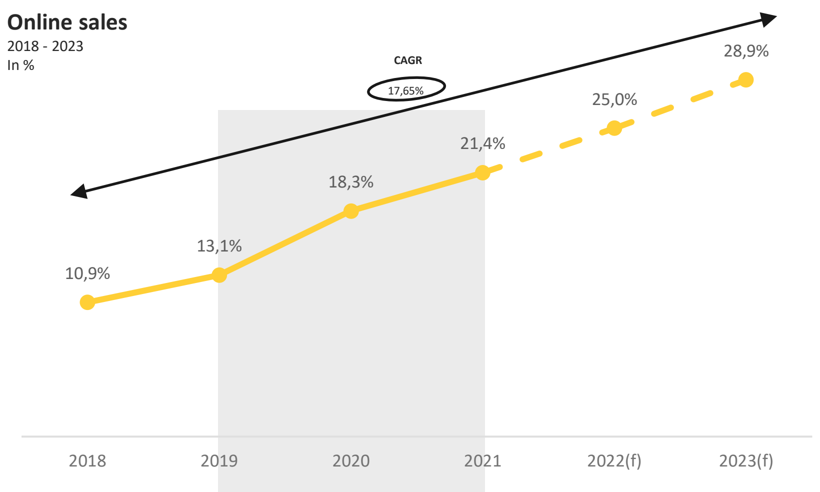


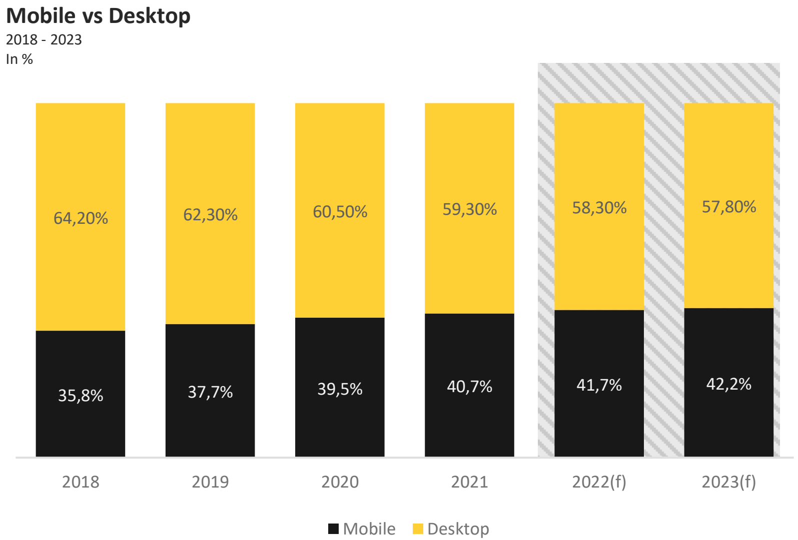
Funded by the European Union

Spanish Child Clothing market - Consumer behaviour

As in all the countries analyzed, the consumption of children's clothing through e-commerces and online distribution channels is increasingly noticeable in the market. Even so, and if the trend is compared with that of other countries, it is shown that the percentage of online sales in Spain is not as significant as in countries such as Poland or Germany, for example.

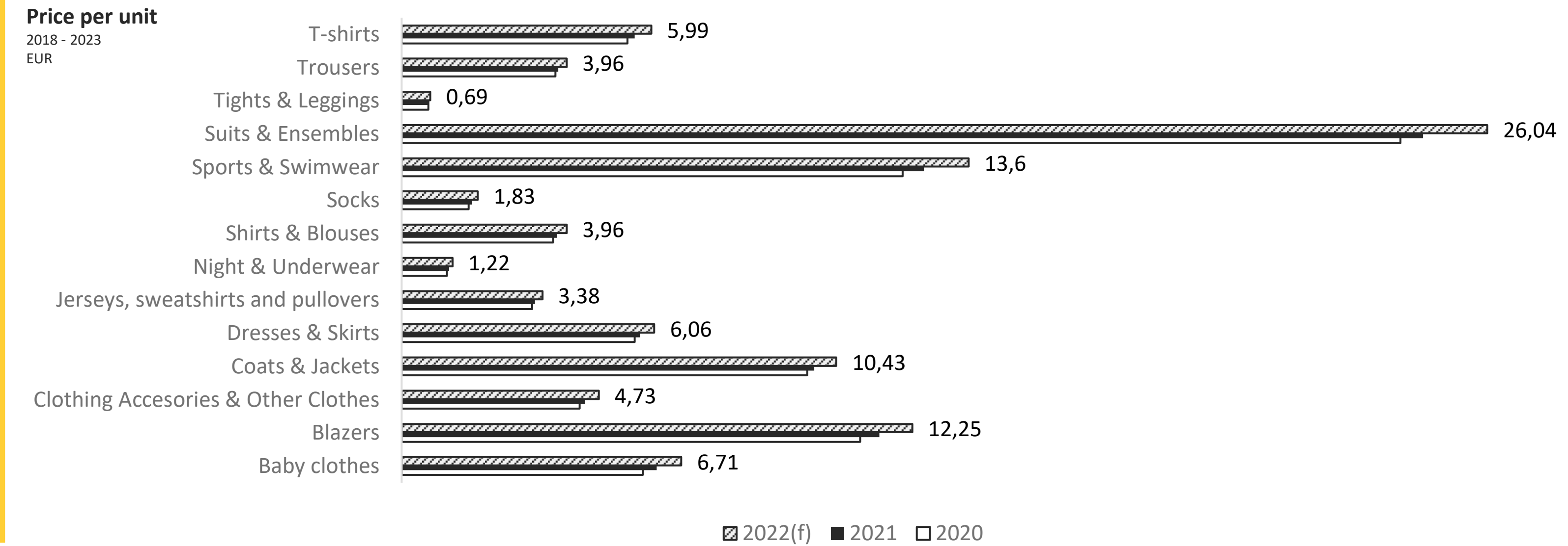
In 2021, online sales in the children's clothing market accounted for **21.4% of total sales**, **40.7%** of which were made through **mobile devices such as smartphones**.





Spanish Child Clothing market by segments - Price per unit

In the case of Spain, it is important to emphasize the rise in prices of the children's clothing market. For trousers and baby clothes, the price has increased although subtly while in other segments such as suits and ensembles or sports and swimwear, the price difference is very significant and may have affected the consumption trend of this type of products. This leads to interpreter that the weak rise in prices in these best-selling segments may be one of the justifications for this phenomenon.



France

Revenue by segments

Average revenue per capita

Volume by segments

Sustainable apparel share

Online sales

Mobile vs Desktop

Price per unit

French Child Clothing market by segments

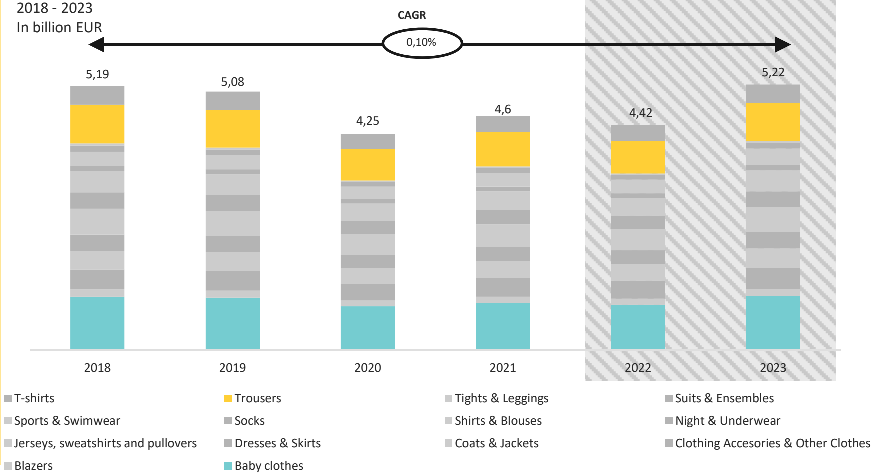
France has the largest number of children in the EU, which positions the country as a clear objective for companies in the sector.

The average annual revenue per capita on children's clothing decreases approximately **0,05%** and per year, resulting in a total market value of **€4,5billion** in 2021.

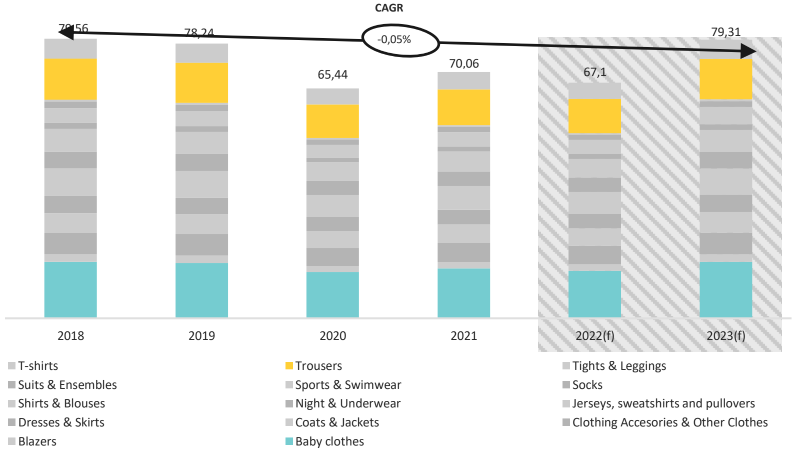
Total market revenue is expected to increase in the coming years considering the increase in the purchasing power of the French.

The segments that bring more monetary value to the sector are trousers and babyclothes, with €0,67 and €0,93billion generated in 2021.

Revenue
2018 - 2023
In billion EUR



Average revenue per capita
total turnover/total population
2018 - 2023
EUR



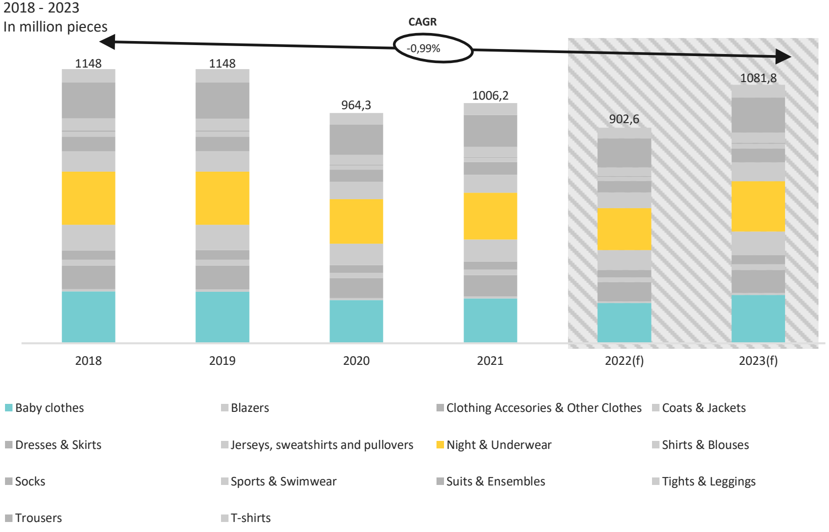
French Child Clothing market by segments

In the case of France, the maximum general volume in the sector is made up of very high figures. In 2021, the total number of articles sold by the set of segments was **1006.2 million**, a superior figure compared to that of 2020 but lower than that of the years prior to the pandemic.

Another fact that stands out from this country is the tendency, above other countries analyzed, to buy pieces of clothing produced with sustainable materials and / or from responsible production processes with the environment. In 2021, some **6,4% of the products of this sector** were considered sustainable.

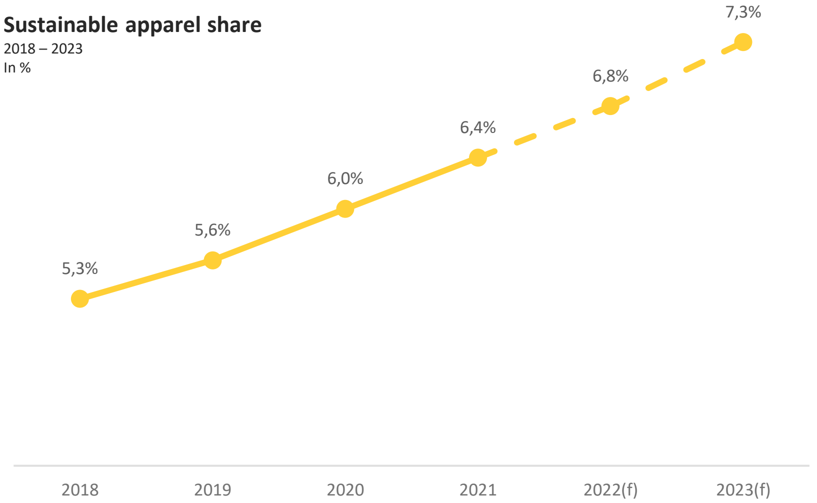
Volume by segments

2018 - 2023
In million pieces



Sustainable apparel share

2018 – 2023
In %



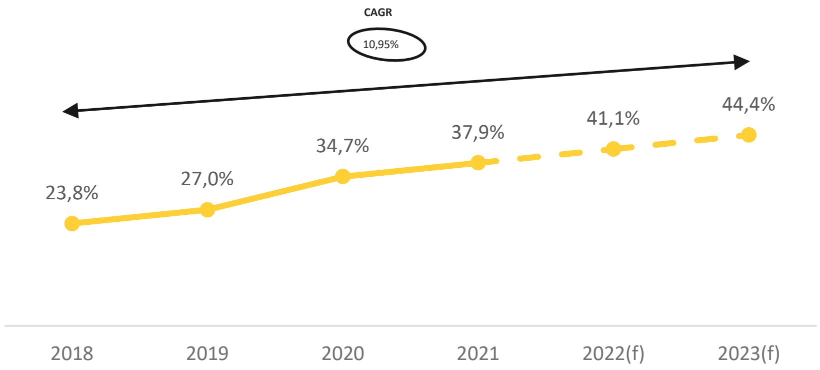
French Child Clothing market - Consumer behaviour

Online sales are expected to increase their influence in the French market, reaching **37,9% of total purchases** of children's clothing made in the country in 2021.

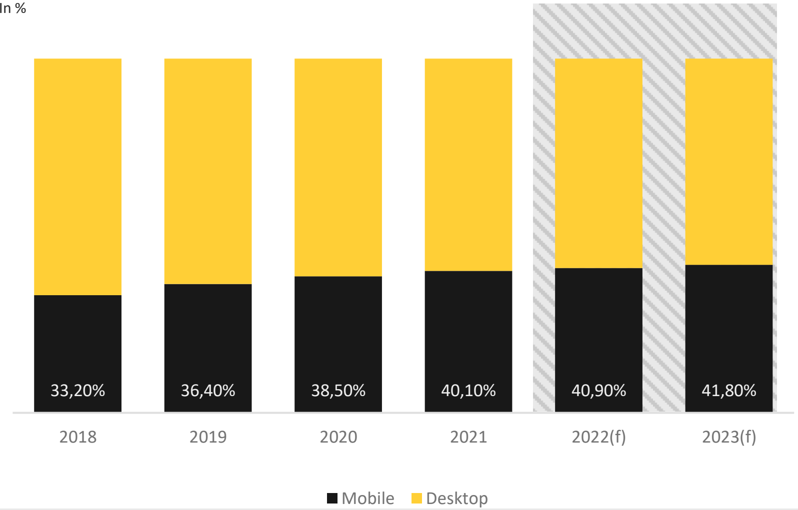
The growth of this trend is within the average of the other European countries analyzed.

The use of mobile phones as a means for the purchase of children's clothing in online sales channels lives a stable growth that is expected to be maintained, reaching **41,80% of total online sales** by 2023.

Online sales
2018 - 2023
In %

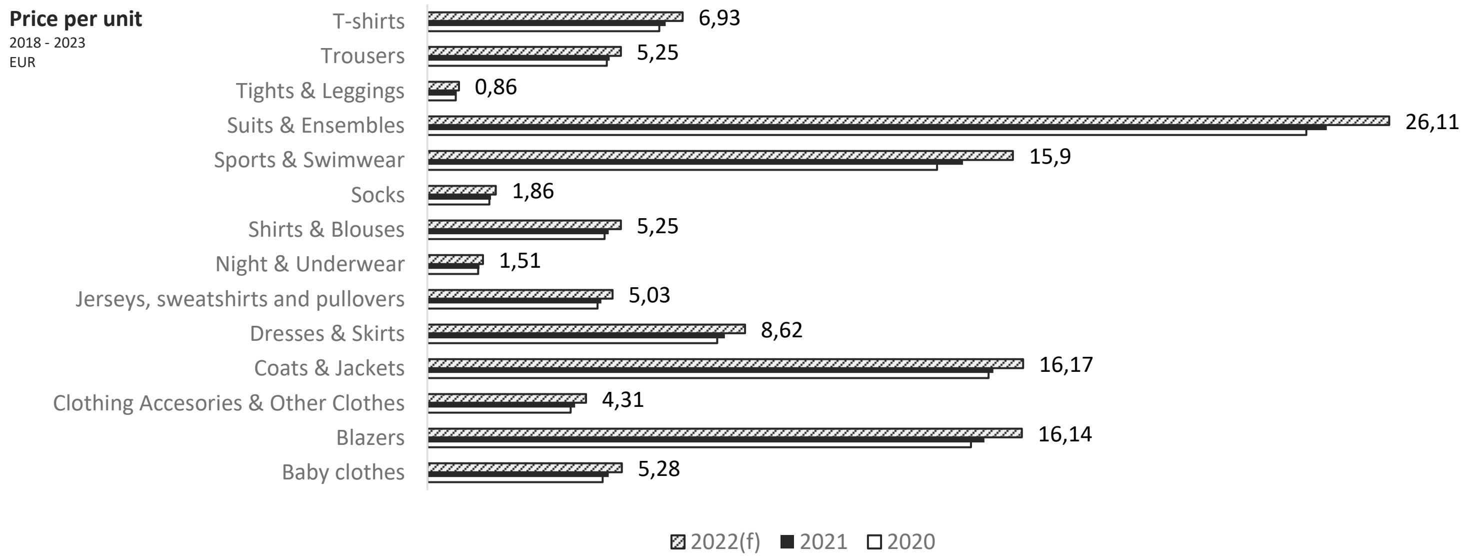


Mobile vs Desktop
2018 - 2023
In %



French Child Clothing market by segments- Price per unit

France, like Spain, experiences remarkable price growth. In the case of the best-selling products in the sector previously mentioned (night & underwear and baby clothes) the price has increased considerably less than in other categories such as suits and ensembles or sports and swimwear, where the difference between 2020 and 2022 is remarkable. This phenomenon may explain, in part, the consumption trend of the most sold segments compared to others, which are more expensive.



KID'S CLUSTER CEIV NOVAKID CHILD Lifestyle&DesignCluster. ekids Funded by the European Union

Italy

Revenue by segments

Average revenue per capita

Volume by segments

Sustainable apparel share

Online sales

Mobile vs Desktop

Price per unit

Italian Child Clothing market by segments

Italy is expected to remain a strong market for children’s wear in Europe due to its size, whereas its growth is estimated to remain slower than in other European countries. It should be noted that in 2023 the total market revenue is expected to reach **€6.54 billion**, a figure that approximates the value of the years before the pandemic.

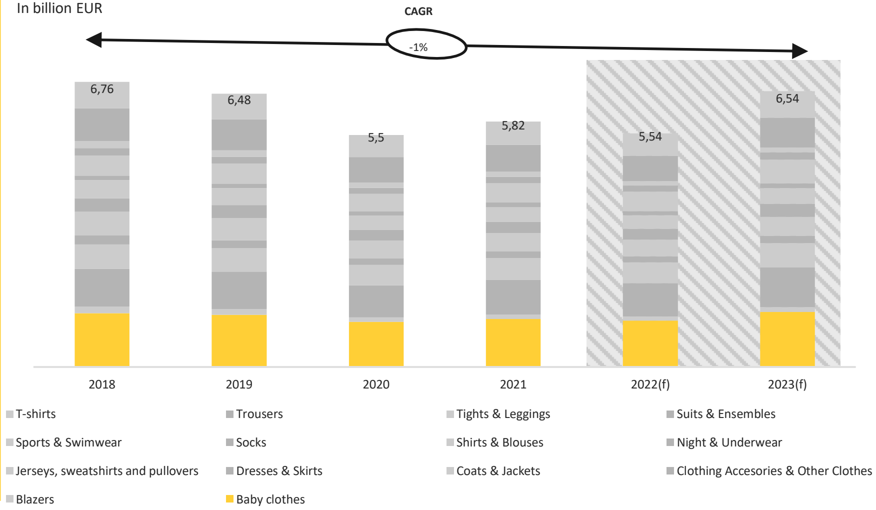
In 2021, the income generated by the Italian child clothing sector was €**5.82 million**.

The segment that brings the most revenue to the Italian market are babyclothes, with **€1.14 In billion** generated in 2021.

Revenue

2018 - 2023

In billion EUR

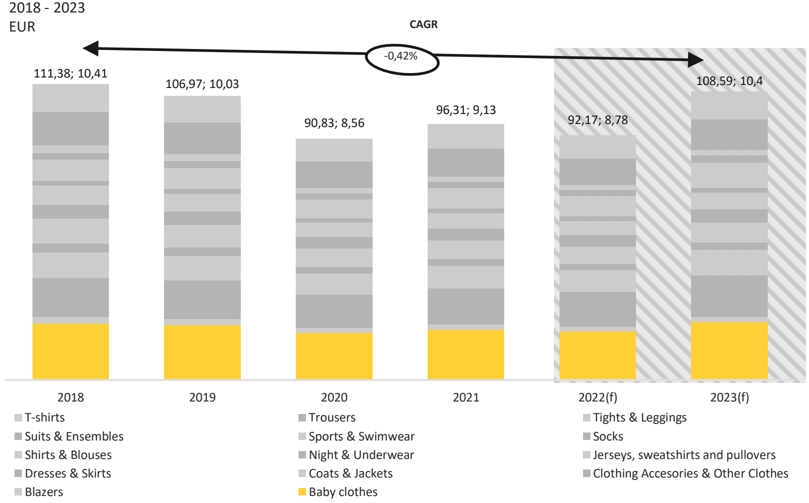


Average revenue per capita

total turnover/total population

2018 - 2023

EUR



Funded by the European Union

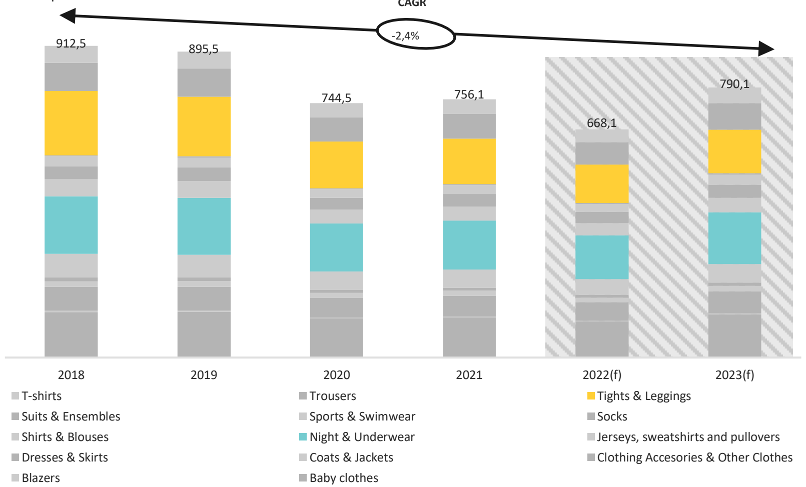
Italian Child Clothing market by segments

The best-selling items in Italy in terms of children's clothing are tights & leggings and night & underwear, despite not being the segments that generate the most money in the sector. As in the rest of the countries, there is an increasingly high trend in the production of sustainable clothing produced, representing in 2021 a **5.70% of the total sales generated** and with expectations of higher values for 2023.

Volume by segments

2018 - 2023

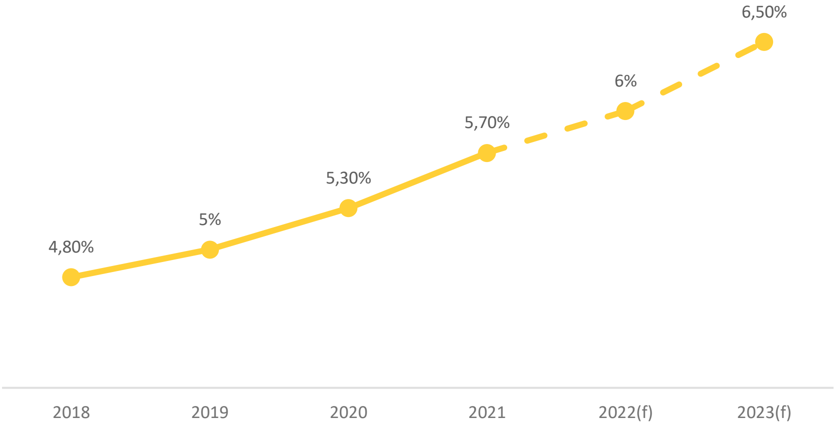
In million pieces



Sustainable apparel share

2018 – 2023

In %



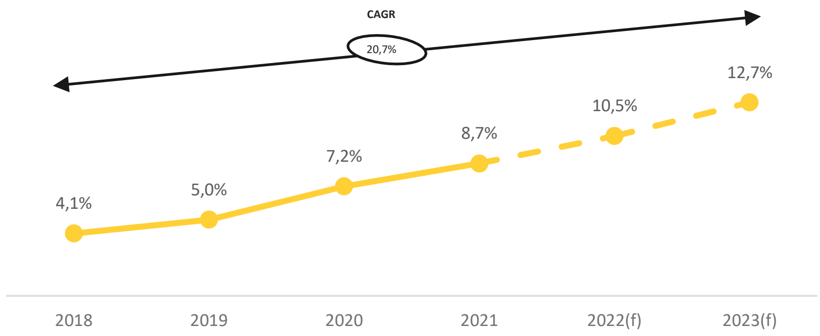
Italian Child Clothing market - Consumer behaviour

Online sales are expected to increase their influence in the Italian children's clothing market, with a considerable **CAGR (20.7%)** compared to other countries.

The use of mobile phones as a means for the purchase of children's clothing in online sales channels lives a stable growth that is expected to be maintained, reaching **41,50% of total online sales** by 2023.

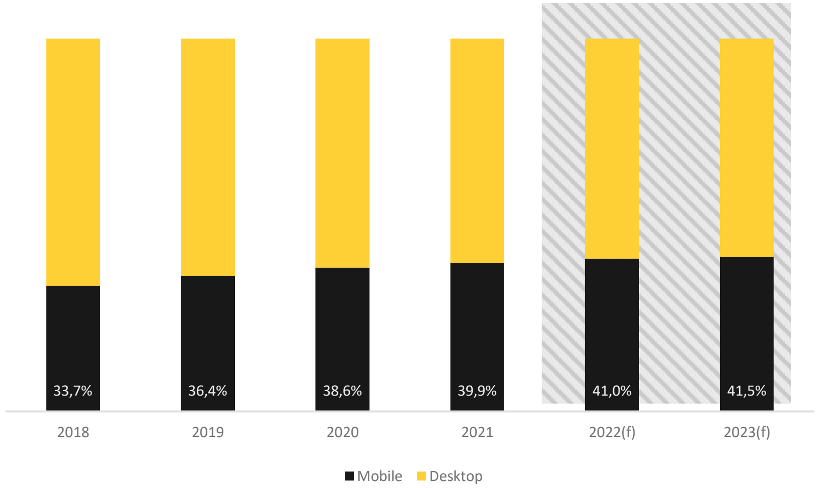
Online sales

2018 - 2023
In %



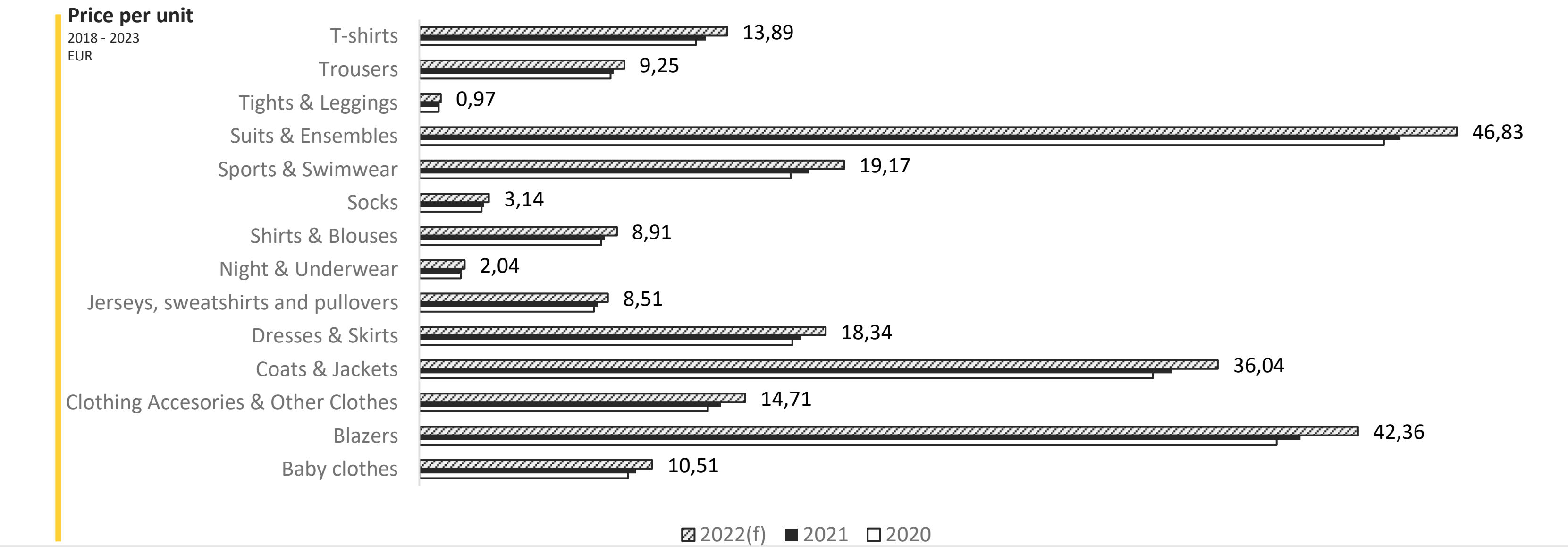
Mobile vs Desktop

2018 - 2023
In %



Italian Child Clothing market by segments - Price per unit

The following graph shows that Italy is a country that has experienced and is experiencing a rise in prices in recent years. The best-selling products in the sector (tights & leggings and night & underwear clothes) are segments that register low prices, which may explain why their consumption is high compared to other types of products and the reason why they are not products that generate high levels of revenue for the market.



Denmark

Revenue by segments

Average revenue per capita

Volume by segments

Sustainable apparel share

Online sales

Mobile vs Desktop

Price per unit

Funded by the European Union

Danish Child Clothing market by segments

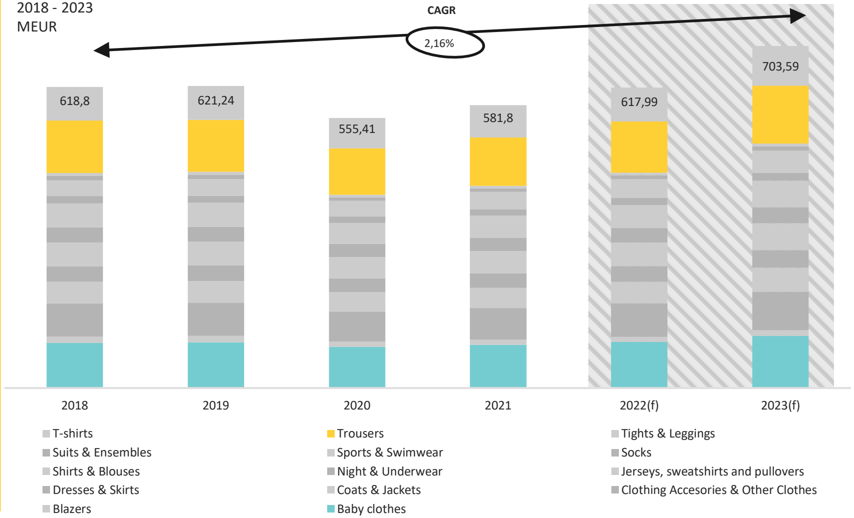
Denmark is a potential market for the children's clothing sector at European level due to the country's high purchasing power. This also explains the high values of the average revenue per capita necessary to reach the total revenue generated in the sector.

It should be noted that in 2023 the total market revenue is expected to reach **€703,59 million**, a very high figure considering the size of the country. In comparison, the total revenue generated by the sector in the last year (2021) was **€581.8 million**.

The segment that brings the most revenue to the Danish market are babyclothes and trousers , with **€88,62** and **€99,22 million** euros generated in 2021.

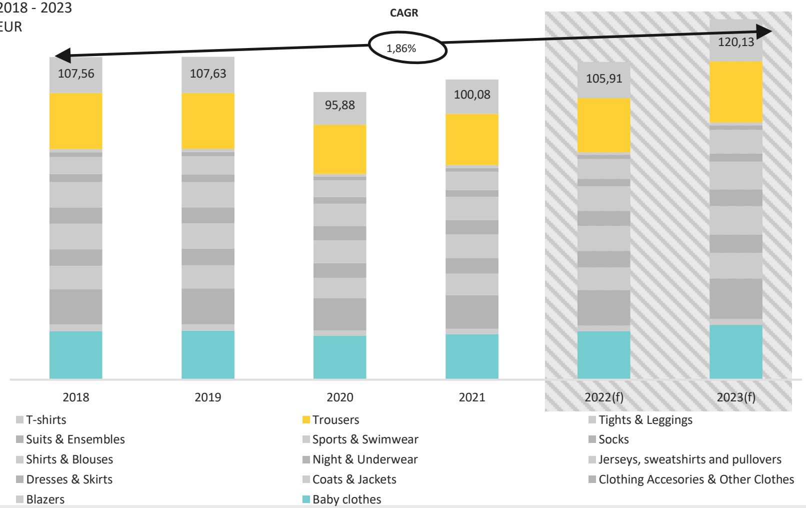
Revenue

2018 - 2023
MEUR



Average revenue per capita

total turnover/total population
2018 - 2023
EUR



Funded by the European Union

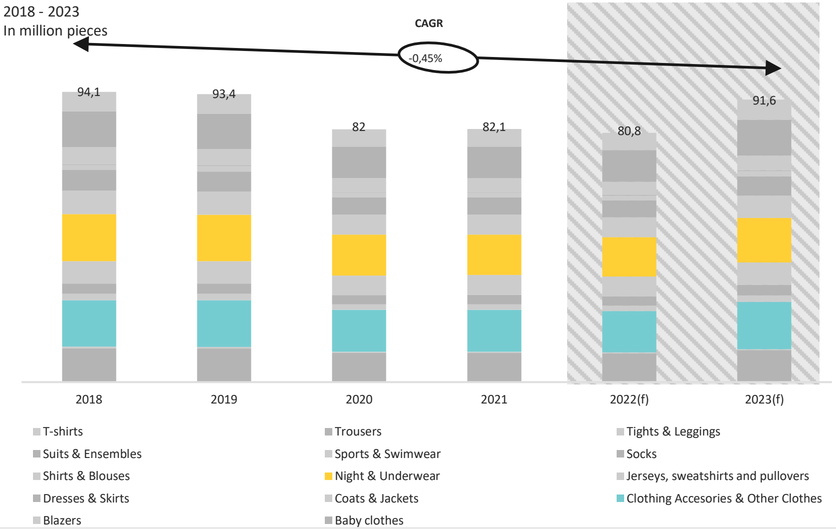
Danish Child Clothing market by segments

In the case of Denmark, by 2021, the total general number of articles sold was **82,1 million pieces**, a superior figure compared to that of 2020 but lower than that of the years prior to the pandemic.

Another fact that stands out from this country is the tendency, above other countries analyzed, to buy pieces of clothing produced with sustainable materials and / or from responsible production processes with the environment. In 2021, the **6,6% of the products sold** were considered sustainable.

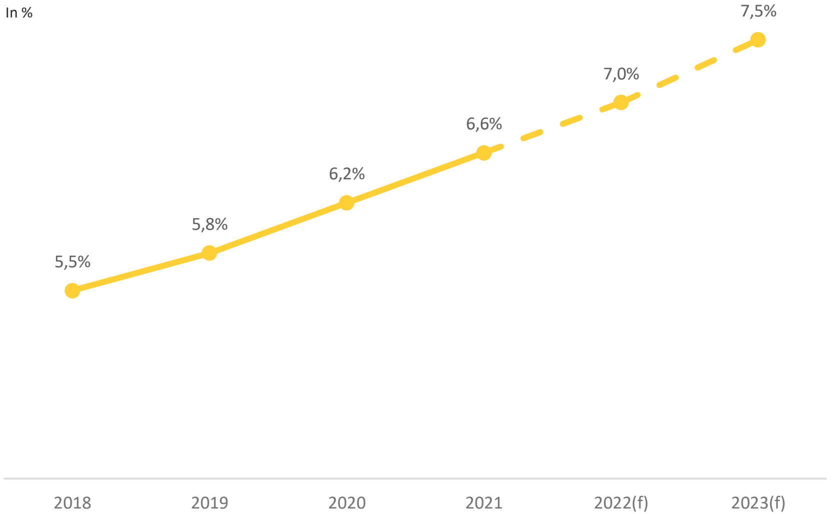
Volume by segments

2018 - 2023
In million pieces



Sustainable apparel share

2018 – 2023
In %



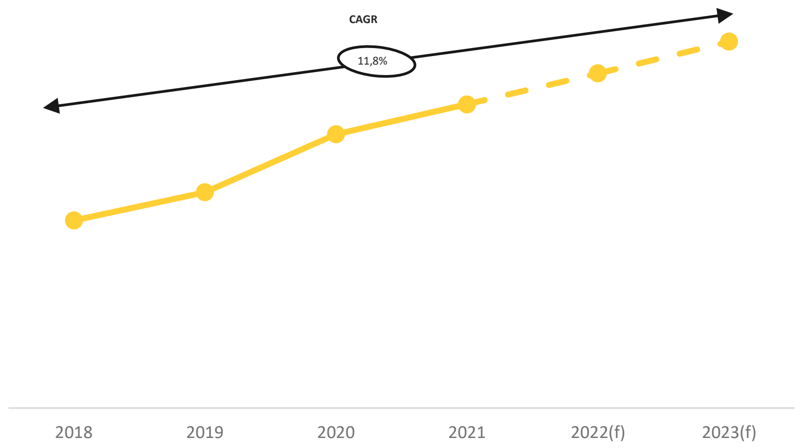
Danish Child Clothing market - Consumer behaviour

As in all the countries analyzed, the consumption of children's clothing through e-commerces and online distribution channels is increasingly noticeable in the market.

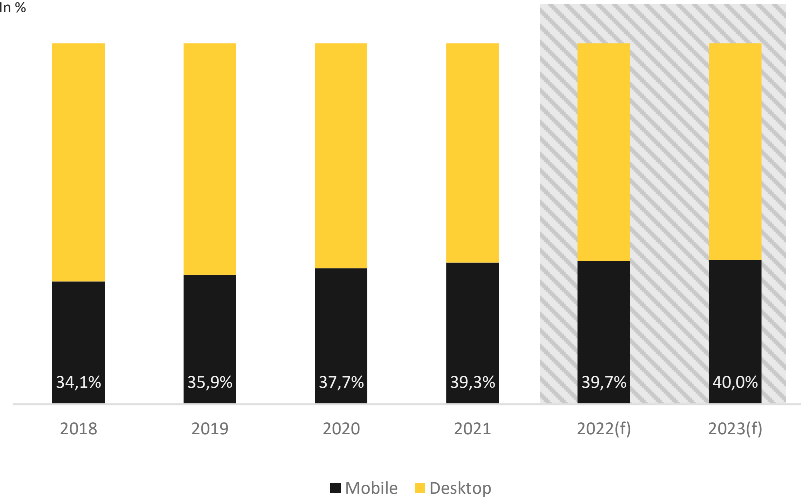
A CAGR of 11.8% is observed, which means that this trend grows in this percentage from one year to the next.

In 2021, online sales in the children’s clothing market accounted for **33,5% of total sales**, **39,3%** of which were made through **mobile devices such as smartphones**.

Online sales
2018 - 2023
In %



Mobile vs Desktop
2018 - 2023
In %



Funded by the European Union

Danish Child Clothing market by segments - Price per unit

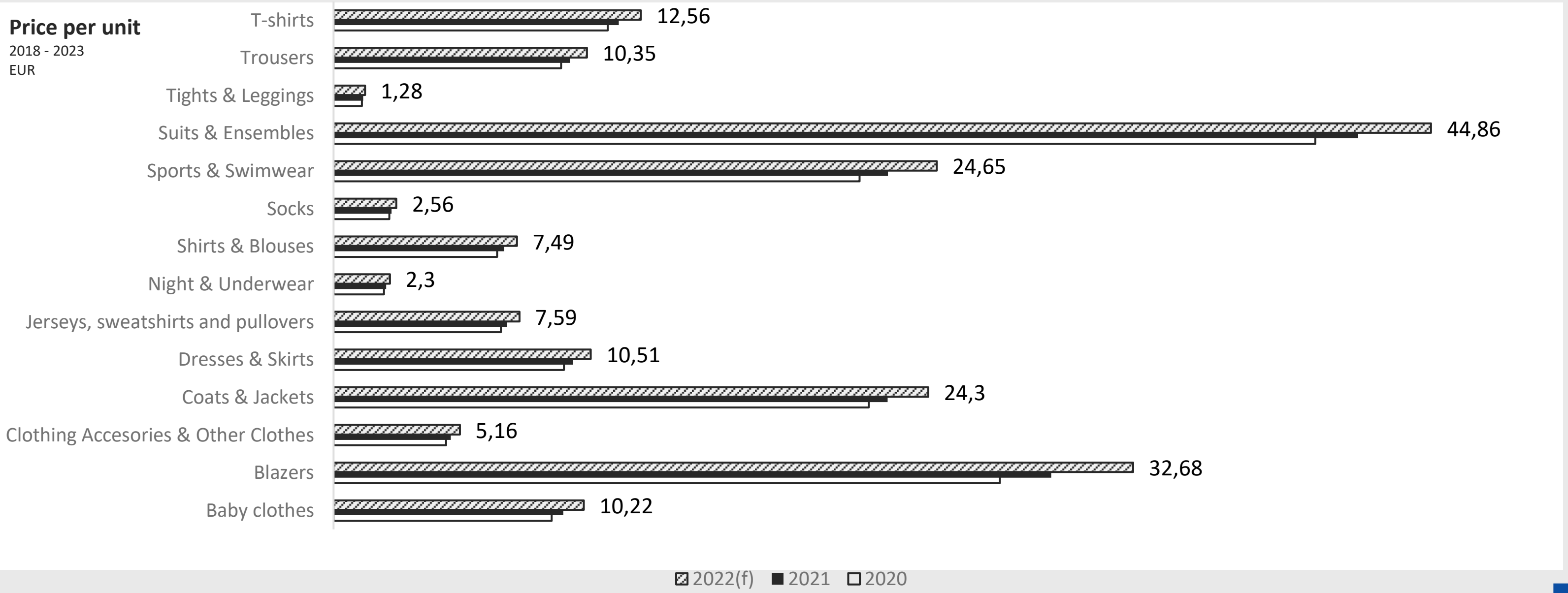
Denmark, because of the wealth of the country, exceeds in terms of the price to other countries. In addition, their prices are increasing based on previous years.

In the case of the best-selling products in the sector previously mentioned (night & underwear and clothing accessories) the price has increased considerably less than in other categories such as Suits and ensembles or sports and swimear, where it can be seen that the difference between 2020 and 2022 is remarkable. This phenomenon may explain, in part, that this type of items is sold more than other more expensive segments of the market.

Price per unit

2018 - 2023

EUR



Lifestyle & Design Cluster.
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Germany

Revenue by segments

Average revenue per capita

Volume by segments

Sustainable apparel share

Online sales

Mobile vs Desktop

Price per unit

Funded by the European Union

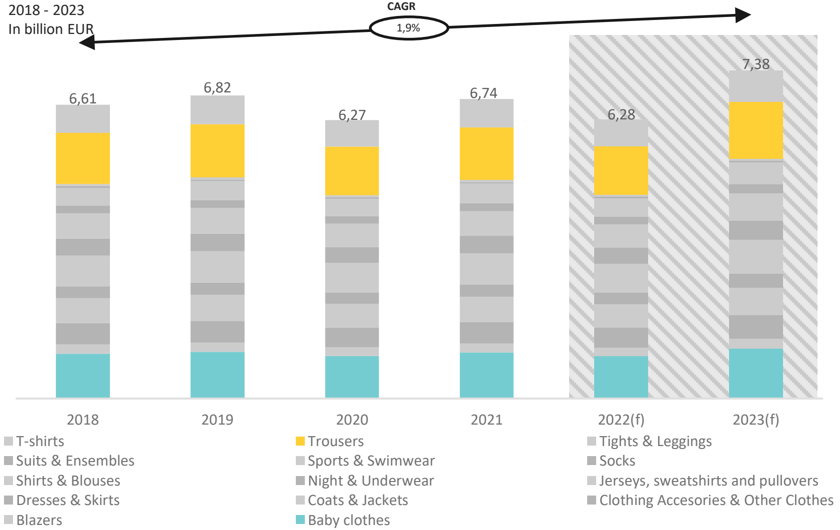
German Child Clothing market by segments

Germany has the third-largest number of children in the analyzed countries. Likewise, the market is expected to grow further in the future. This amount results in a strong children's wear market value of approximately **€6,74 billion in 2021**, with a growth tendency for the future. The average annual revenue per capita on children's wear is estimated at **€80,45.**

Revenue by segments

2018 - 2023

In billion EUR

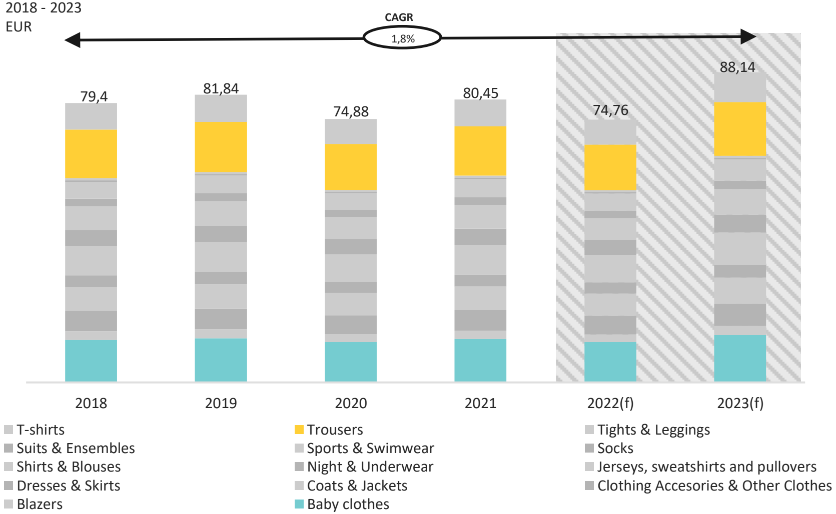


Average revenue per capita

total turnover/total population

2018 - 2023

EUR



Funded by the European Union

German Child Clothing market by segments

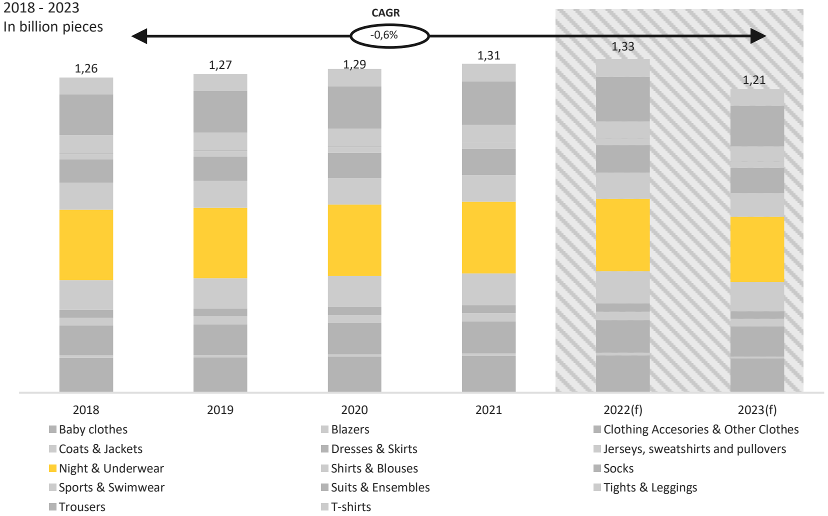
Despite not being included within the segments with the highest revenue generated in the sector, underwear and night wear are the segments that represent a greater volume of sales, representing **286,7%** of the total sector volume of sales produced in 2021.

The trend of buying organic and sustainable products has been growing since 2018 and is expected to grow even more in the coming years, positioning the concept of "Eco Fashion" **at 7%** of the sector total market share by 2023.

Volume by segments

2018 - 2023

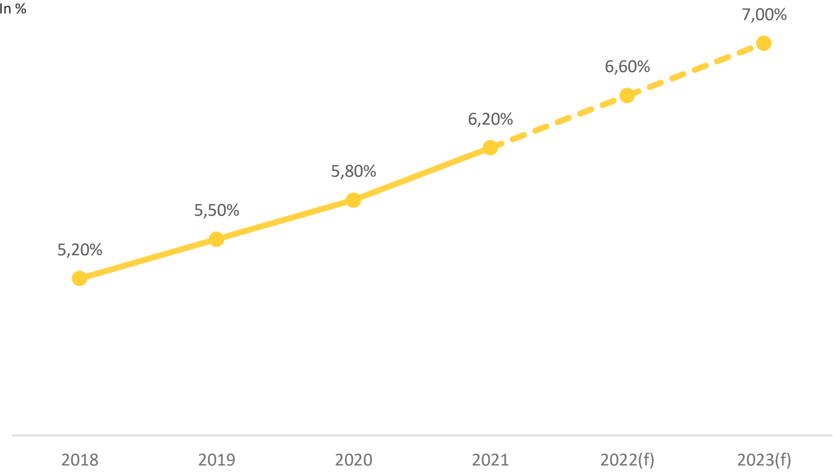
In billion pieces



Sustainable apparel share

2018 – 2023

In %



German Child Clothing market - Consumer behaviour

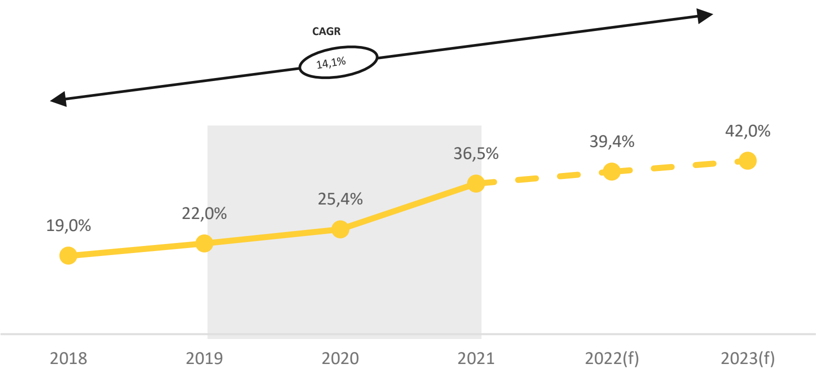
German brands that focus solely on children’s wear are quite rare in Germany and focus mostly on the distribution via e-commerce. The trend of buying children's clothes in online sales channels is experiencing a notable increase, accounting for almost half of total sales in 2021 (**36.5%**). This consumption trend is expected to grow at a **CAGR** of **14.1%** until 2023.

Online purchases through mobile devices remain around 40% while the rest is made through computers.

Online sales

2018 - 2023

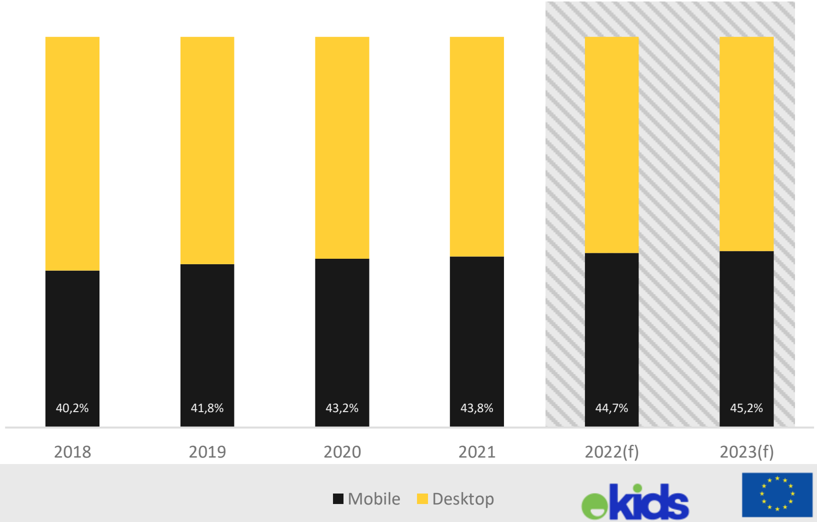
In %



Mobile vs Desktop

2018 - 2023

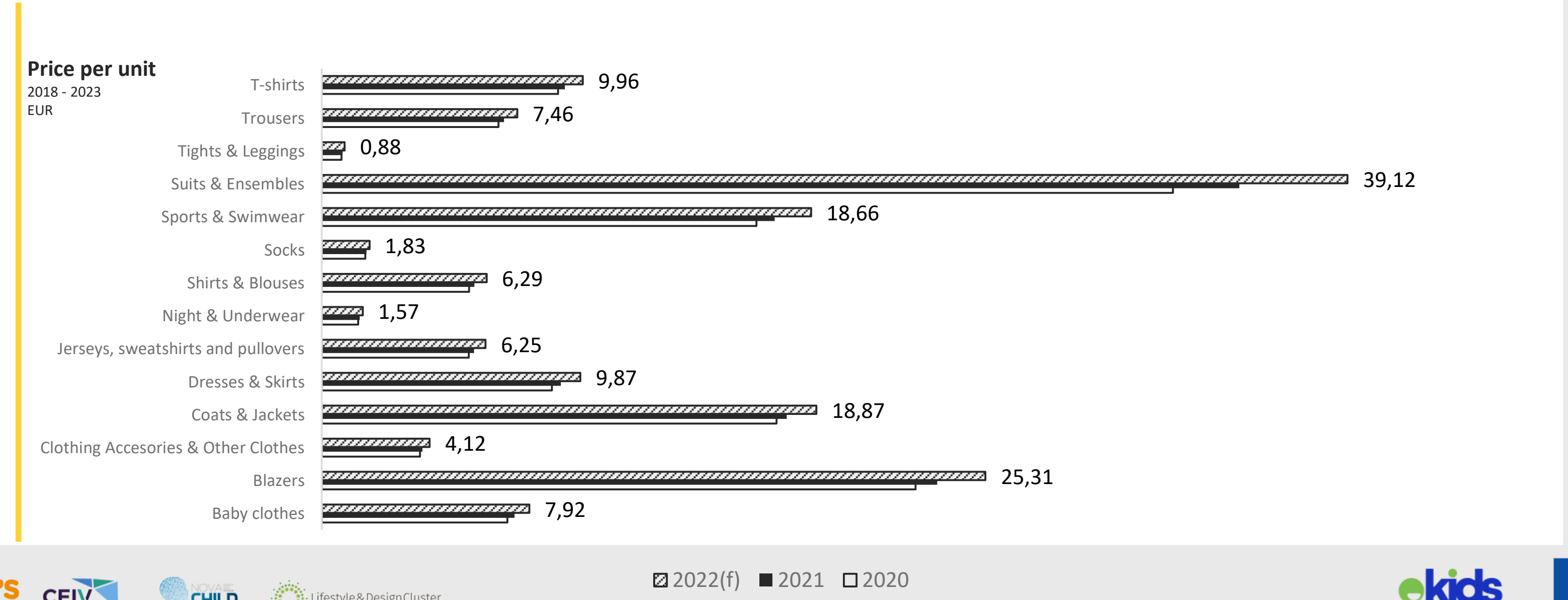
In %



German Child Clothing market by segments - Price per unit

As mentioned above, the average revenue per capita is growing in the German country. This increase can be explained by the increase in prices from one year to the next.

As can be seen on the map, all categories have gone up in price. Suits & ensembles is the most expensive segment in the sector, positioning itself at **€ 39.12** per piece.



Poland

Revenue by segments

Average revenue per capita

Volume by segments

Sustainable apparel share

Online sales

Mobile vs Desktop

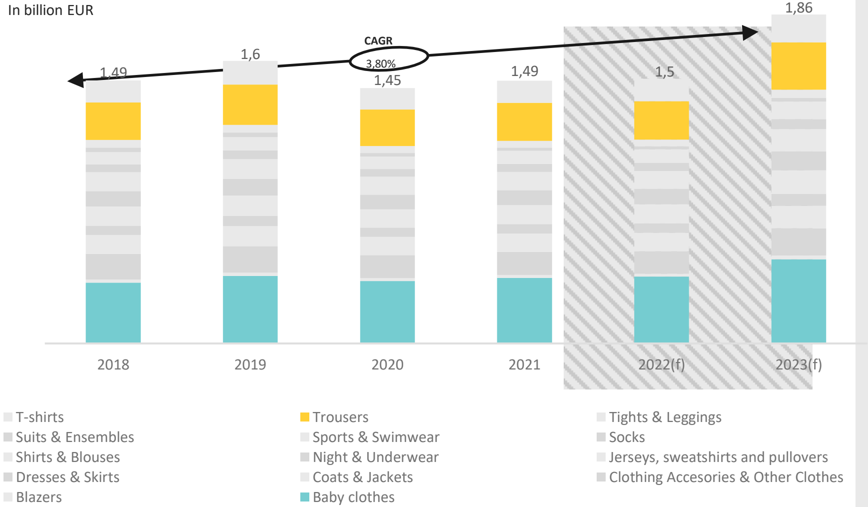
Price per unit

Poland Child Clothing market by segments

Poland is the European market with the sixth-largest number of children in the EU. Nevertheless, the average annual spending on children's wear is the lowest of the top 6 countries. The sector average annual revenue per capita on the clothing is about **39,33€** , resulting in a market value of estimated **€1,49 billion** in 2021. It is expected that the total revenue of the sector increase in a **3, 80% (CAGR**) year by year.

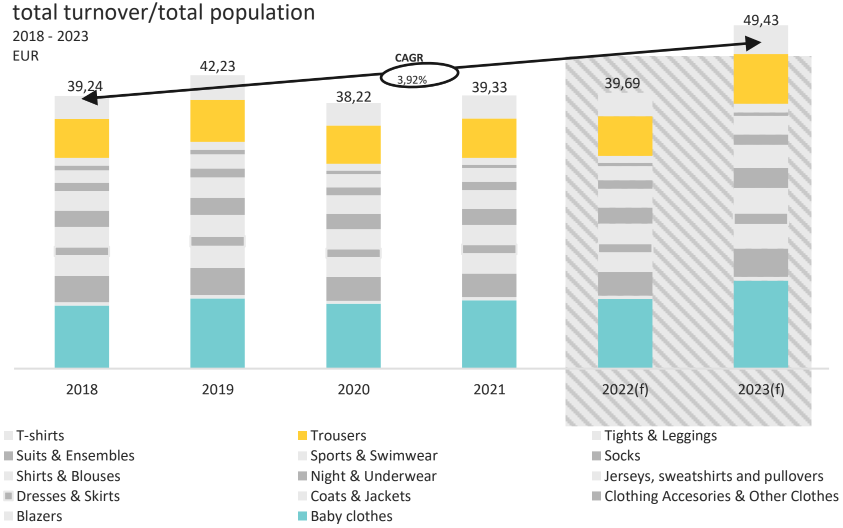
Revenue by segments

2018 - 2023
In billion EUR



Average revenue per capita

total turnover/total population
2018 - 2023
EUR



Funded by the European Union

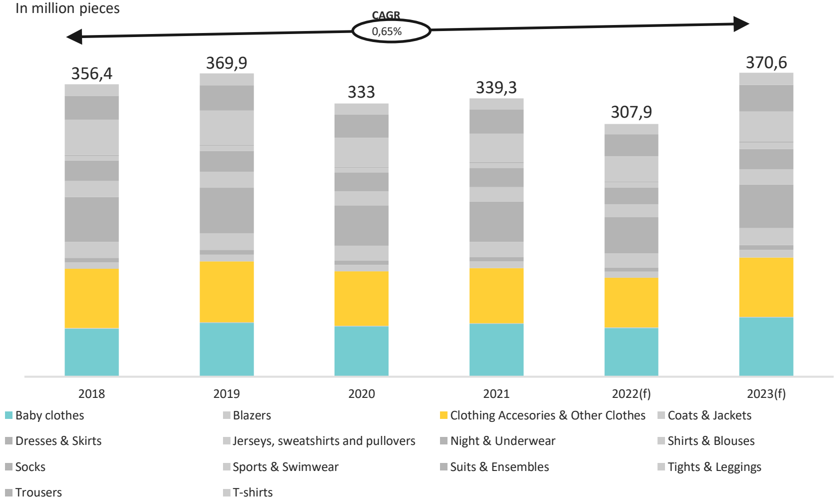
Polish Child Clothing market by segments

Baby clothes, one of the segments that brings the most value to the sector,, is also one of the most volume-intensive in terms of number of pieces sold in the market, with a total of **64.2 million pieces generated in 2021**. With this are clothing accessories, with a total of **60.6 million pieces sold** in 2021.

The trend of buying organic and sustainable products has been growing since 2018 and is expected to grow even more in the coming years, positioning the concept of "Eco Fashion" **at 5,6%** of the sector total market share by 2023. .

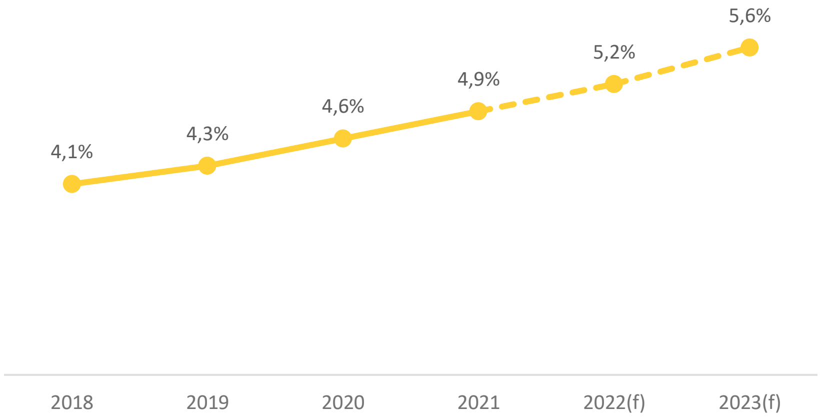
Volume by segments

2018 - 2023
In million pieces



Sustainable apparel share

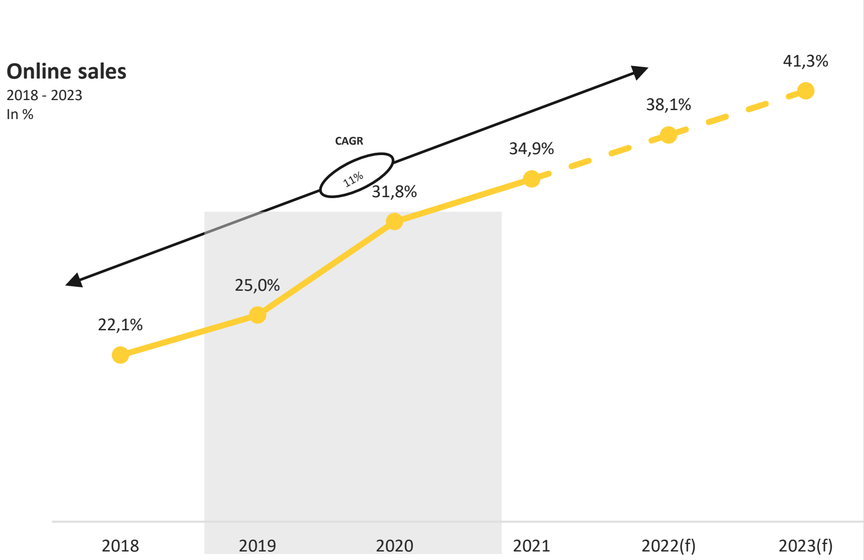
2018 – 2023
In %

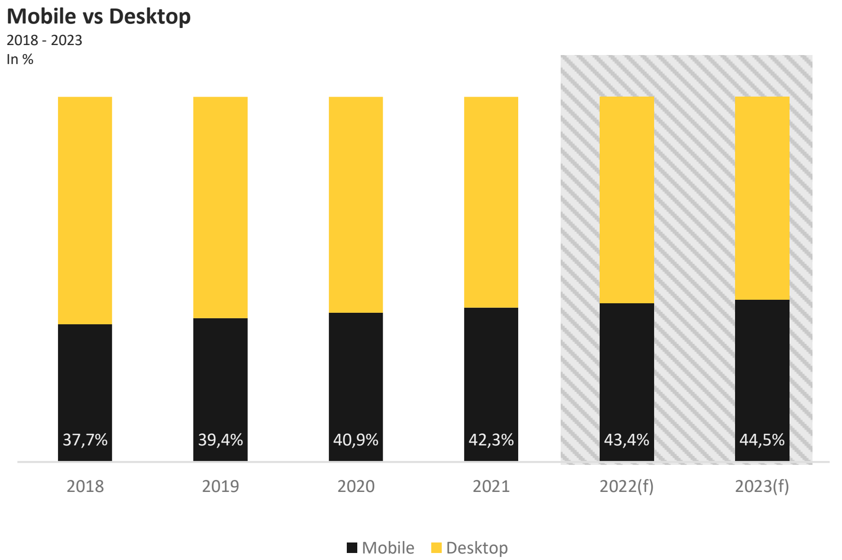


Polish Child Clothing market - Consumer behaviour

Online sales are expected to increase their influence in the Polish market, reaching **41.3% of total purchases** of children's clothing sold in the country in 2023. The growth of this trend is within the average of the other European countries analyzed.

The use of mobile phones as a means for the purchase of children's clothing in online sales channels lives a stable growth that is expected to be maintained, reaching **44.5% of total online sales** by 2023.

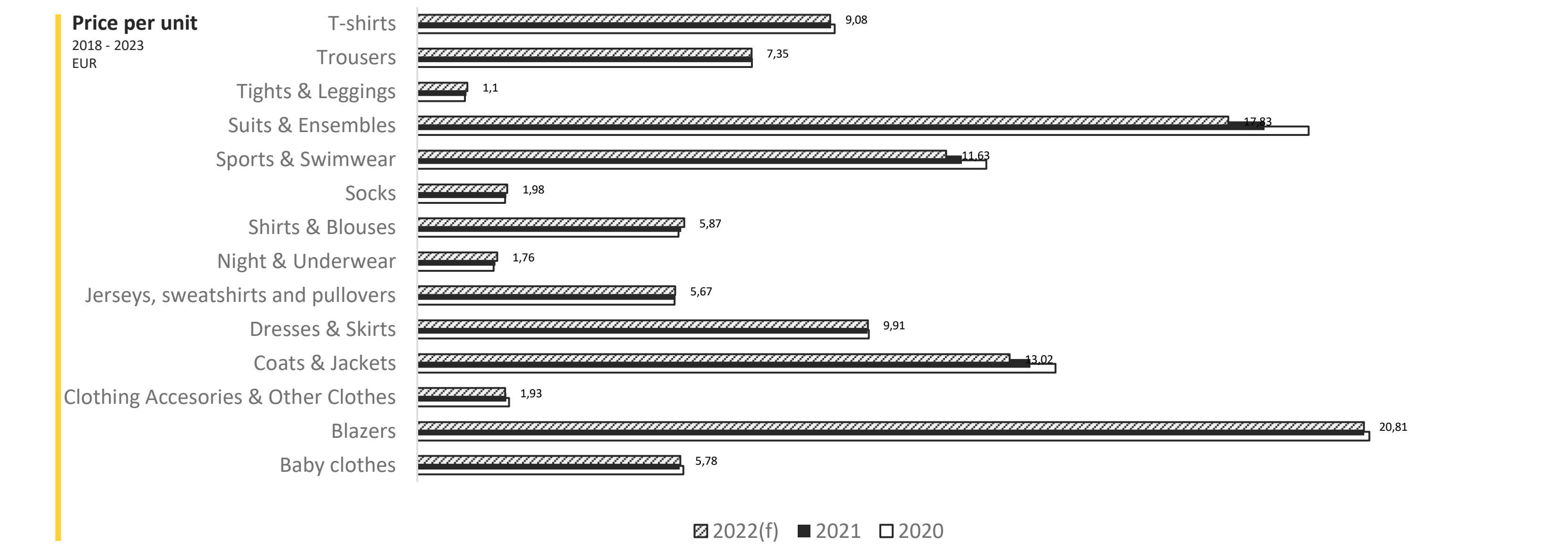




Polish Child Clothing market by segments – Price per unit

The average annual spending on children’s wear is the lowest of the analyzed countries due to the prices, which decreased over the years analyzed in practically all segments of this sector.

In the case of the best-selling segments (clothing accessories & other clothes and baby clothes) it can be seen that they are categories with relatively low prices, reason why they do not generate a high revenue compared to other categories.



Slovakia

Revenue by segments

Average revenue per capita

Volume by segments

Sustainable apparel share

Online sales

Mobile vs Desktop

Price per unit

Funded by the European Union

Slovak Child Clothing market by segments

The Slovak children's clothing market is a potential market because, expecting the pandemic year 2020, it is experiencing a remarkable and constant growth in terms of revenue. In 2021, the total income generated by the sector was **€173.7 million**.

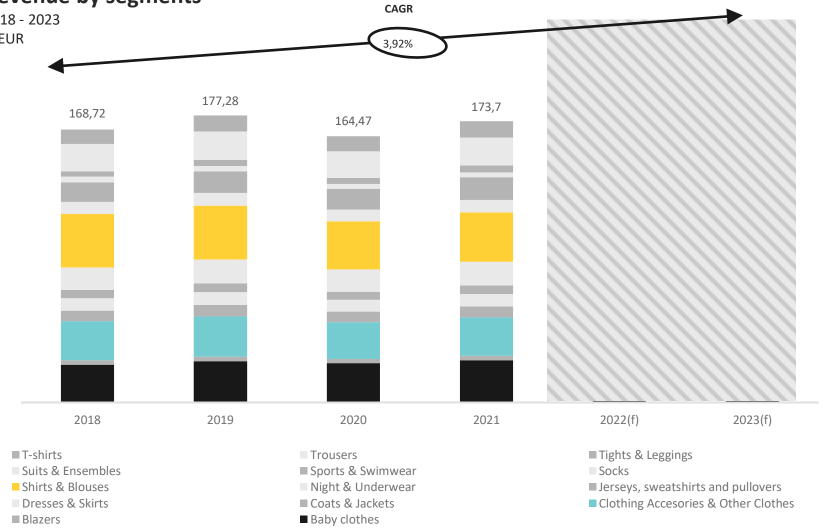
The revenue figure is influenced by the average annual revenue per capita, that since 2018 increases by **3.91% per year**.

The product segments of children's clothing that bring the most money to the sector are babyclothes, clothing accessories and shirts &blouses.

Revenue by segments

2018 - 2023

MEUR

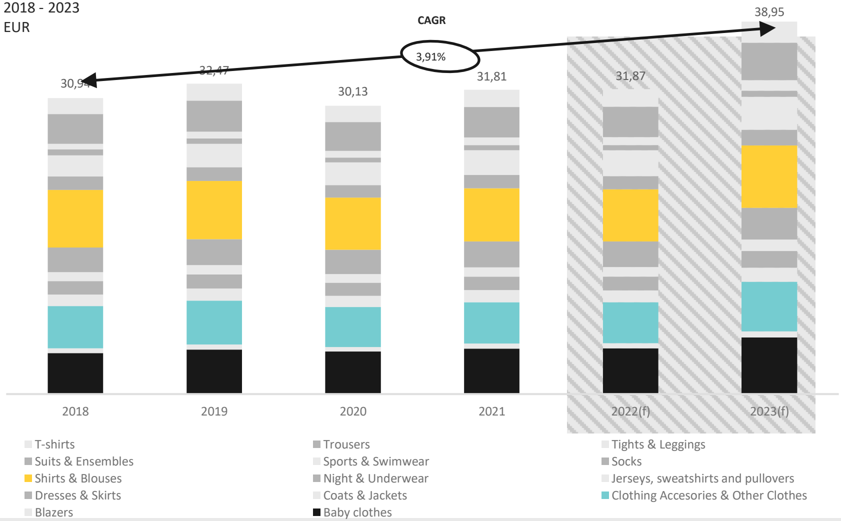


Average revenue per capita

total turnover/total population

2018 - 2023

EUR



Funded by the European Union

Slovak Child Clothing market by segments

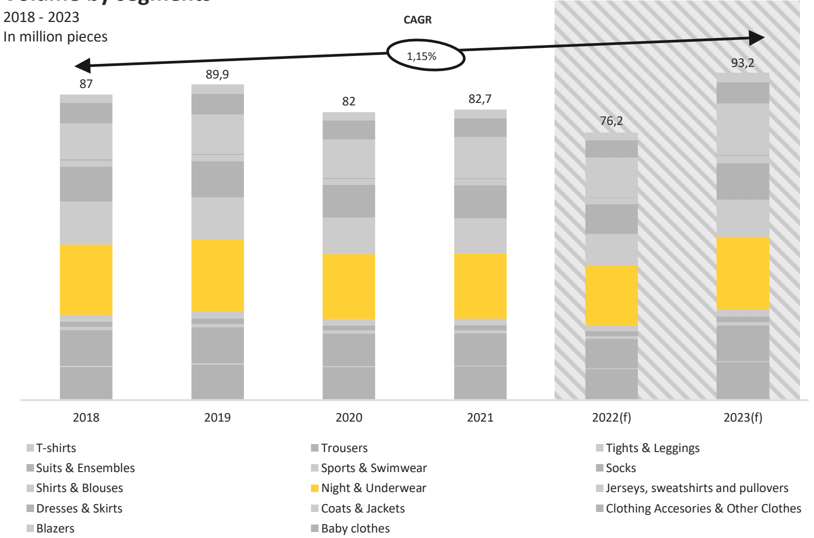
Night and underwear, despite not being a segment that generates higher revenue figures, is the best-selling category. The graph shows that this trend of consumption in terms of this segment is constant in the years analyzed.

The trend of sustainable production and consumption, as in the rest of European countries, continues to grow, representing in 2021 5.4% of the total share of the sector.

Volume by segments

2018 - 2023

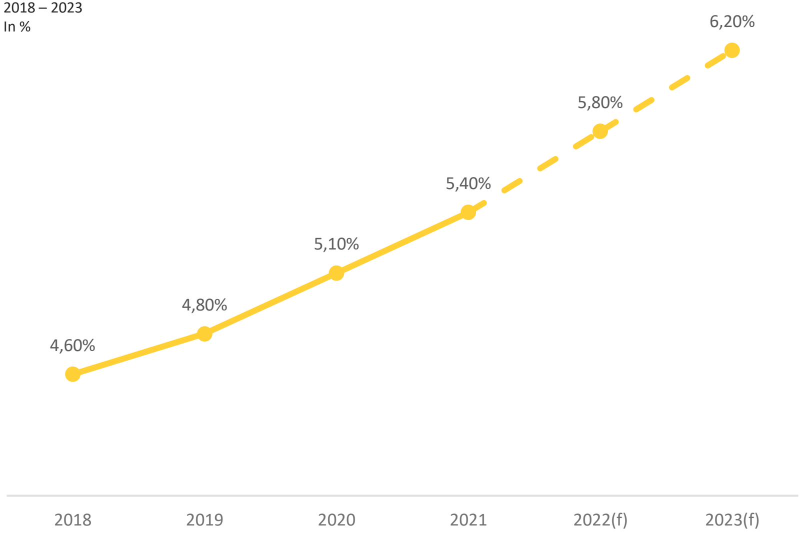
In million pieces



Sustainable apparel share

2018 – 2023

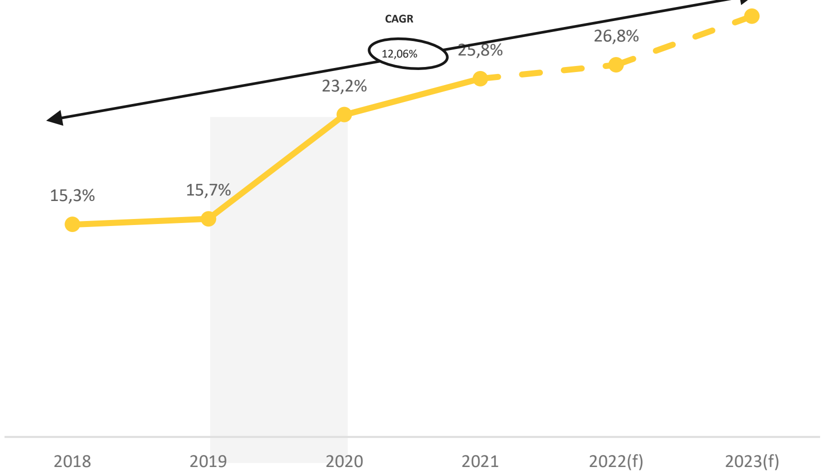
In %



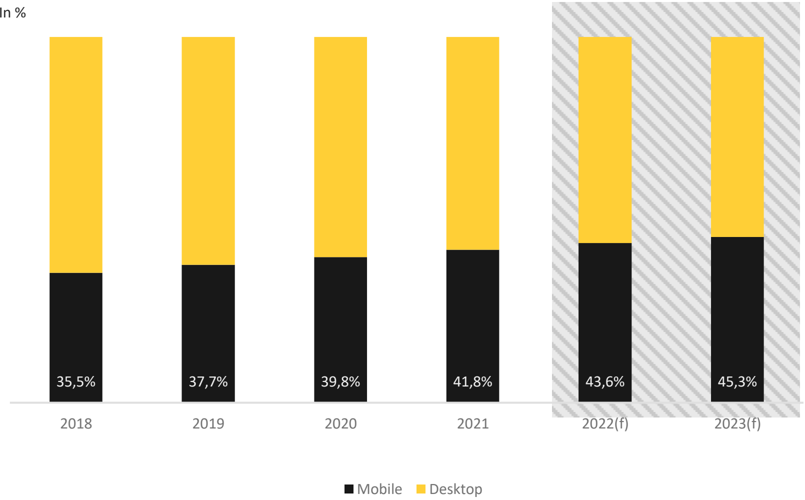
Slovak Child Clothing market - Consumer behaviour

It is important to note that despite the small size of the country, online sales of children's clothing represent a remarkable percentage of the total sales generated. The graph shows how, from 2019 to 2020, this trend grew excessively, possibly due to the confinement due to the COVID-19 pandemic. It is expected that in 2023 total online sales will represent **30.3%** of total sales in the sector, **45.3%** of which would be generated through mobiles.

Online sales
2018 - 2023
In %

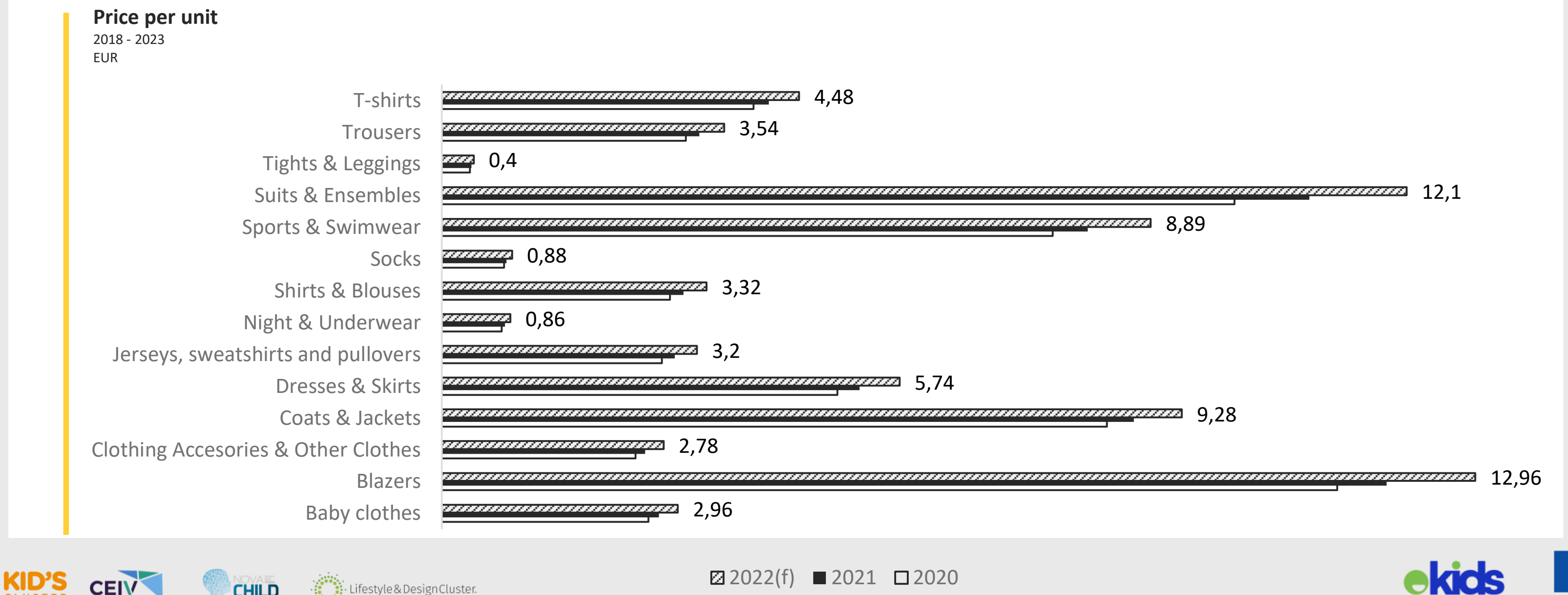


Mobile vs Desktop
2018 - 2023
In %

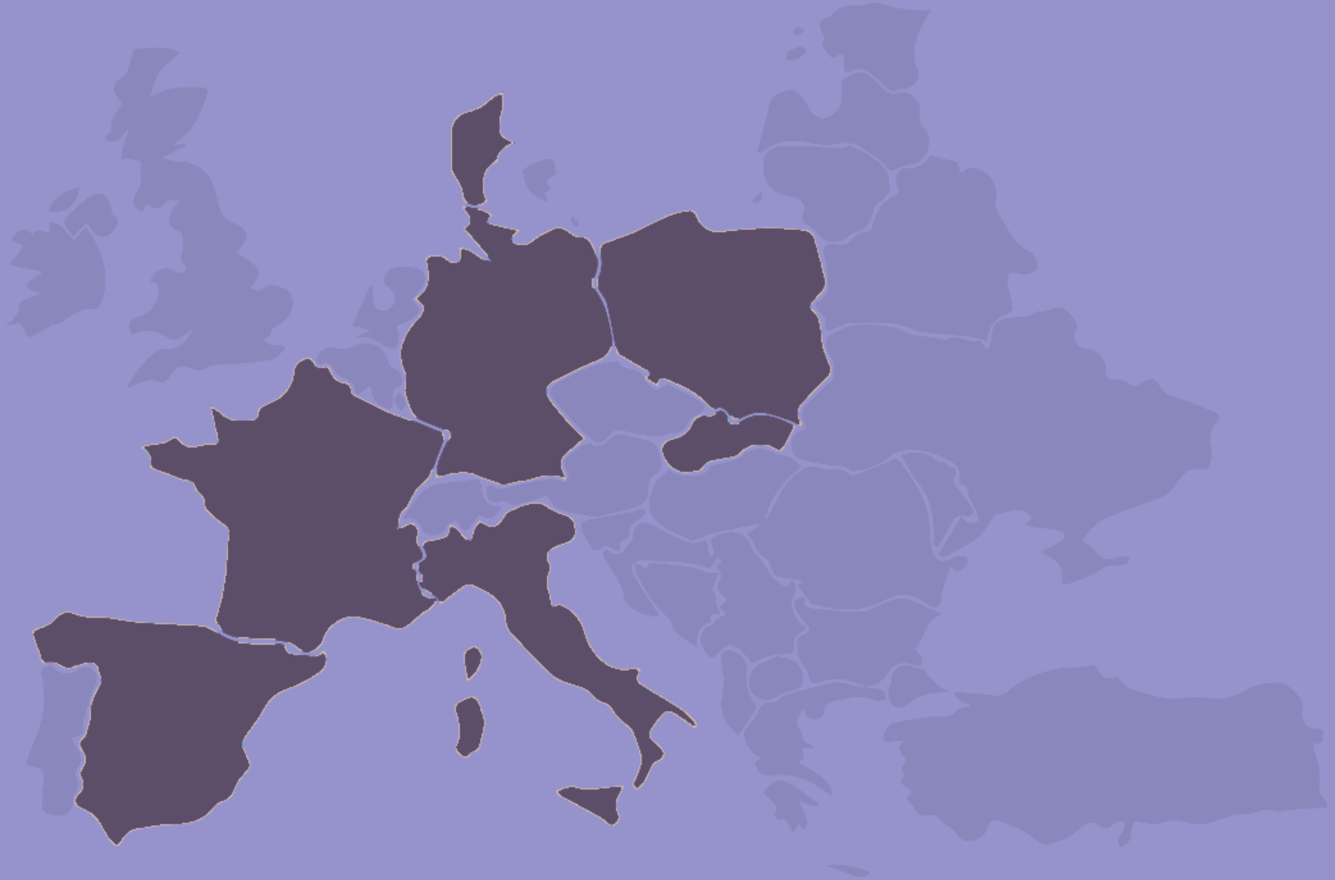


Slovak Child Clothing market - Price per unit

The following graph shows the rise in prices in the set of segments of the sector, which implies a growth of the average annual revenue per capita as described in previous graphs. The best-selling product segment (night & underwear) is one of the cheapest categories, factor that can influence your high number of sales in respect other segments.



2.2.3. Child Food



Foods intended for infants (children under the age of 12 months) and young children (aged between one and three years), include:

- Infant and follow-on formulae
- Processed cereal-based foods: simple cereals, cereals with an added high protein food, pastas, rusks and biscuits;
- Baby foods

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2.2.3. Child Food

Key findings

The European **children's food market** is a **smaller in comparison** to other categories analysed but it has been showing **significant growth in the last few years that is expected to continue**.

- The market size in 2021 was estimated at **8,31 In billion EURos** and is expected to reach 9,9 in 2023, a **CAGR of 4%** for 2018-2023.
- The 7 countries we have analysed in depth represented **32% of the overall European children's food market in 2021**.
- Within the markets analysed, **France** has the largest markets in terms of revenue and is comparatively larger in terms of revenue per child, followed by **Germany, Italy and Spain**, followed by **Poland** and finally by **Denmark and Slovakia.**
- **Slovakia and Poland are the countries with the largest expected CAGR** (7,8% and 6,2% respectively), while **the Italian markets' growth is significantly lower, at only** 1,9% CAGR 2018-2023.
- The growth of the middle class and the increase in the number of working women are factors that energize the market.

Evolution in volume and price

- The volume of products sold in Europe has decreased since 2018 (-1,75% CAGR 2018-2023), but prices per unit have increased steadily by 5% CAGR in the same period, which means that less and less child food is sold at a higher price.

- Regarding the group of countries analysed, **volume of products sold grows significantly in Slovakia** (2,9% CAGR 2018-2023) and **Poland** (2,1% CAGR for the same period). Meanwhile, **volume is decreasing in Italy and France**, by –1,1% and -0,5% CAGR 2018-2023 respectively.

- **Unit prices** in the region were at **6,69€** in 2021, with an expected CAGR of 5% for the 2018-2023 period.

- There are **significant differences among countries** analysed: unit price in 2021 was 12,91€ in Denmark, 10,95€ in Italy and only 3,81€ in Poland.

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2.2.3. Child Food

Significant trends

Ecommerce

- All European markets have shown a significant growth in online sales, which accelerated in 2020 due to the COVID-19 crisis, although the share of online channels for food products is smaller compared to other categories. Currently, **3,2% of children's food sales in Europe are online**, with an **expected 19,2% CAGR** 2018-2023.
- Germany, France and Spain have the highest percentage of online children's food shoppers (2,7%, 2,3% and 2,1% in 2021 respectively).
- Online sales grew by 30% in the region due to COVID, but some countries experienced very significant growth: 50% in Slovakia, 38% in Germany and France.
- European consumers like to shop online for food products in the growing number of retailers due to convenience, ease of use, time savings, the availability of greater range of products, as well as offers and promotions

Sustainability & health

- The food industry has also been **influenced by consumer demands towards more sustainable and eco-conscious values**, both affecting the types of product demands as well as expectations on company's processes, from social practices, to carbon footprint or choice of packaging
- Consumers' **increasing focus on health is growing demand for minimally processed and nutritionally varied foods**, incorporating trends such as superfoods or plant-based ingredients to improve physical and mental health.

Europe

Revenue

Average revenue per capita

Volume

Price per unit

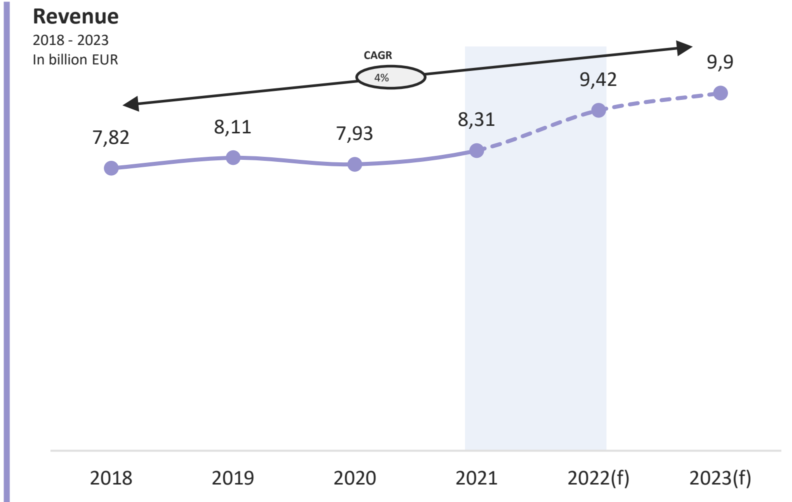
Online sales

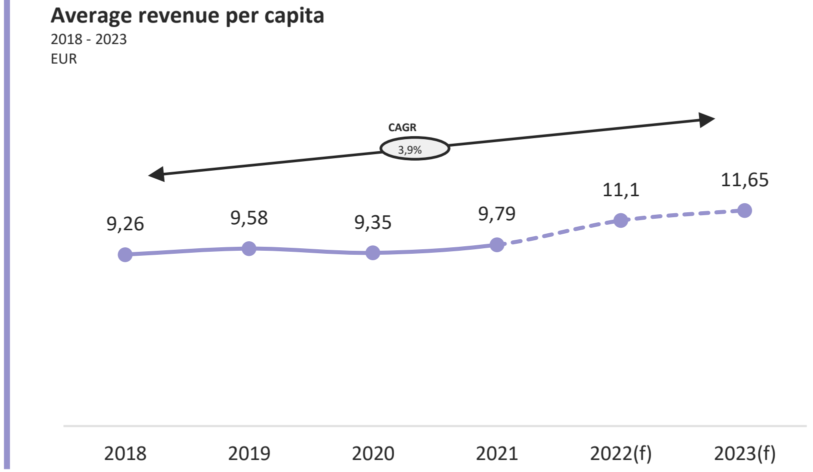
European Child Food market - Revenues

The European baby food market is projected to reach **€9.42 billion by 2022**. The growth of the middle class and the increase in the number of working women are factors that energize the market, which is expected to growth in terms of revenue by 4% (CAGR) by 2023. However, the price that the entire population should pay to reach the levels of revenue analyzed is increasing every year.

**The charts on this sheet take into account the products that are included in the sector definition on page 127 and are based on information from the 50 current countries in Europe.*

As can be seen in the graph on the left, in 2020 total European child food market revenue decreased while the total revenue of the market of the analyzed countries increased, a phenomenon that can be explained by the growing trend of the other European countries not analyzed in the report.





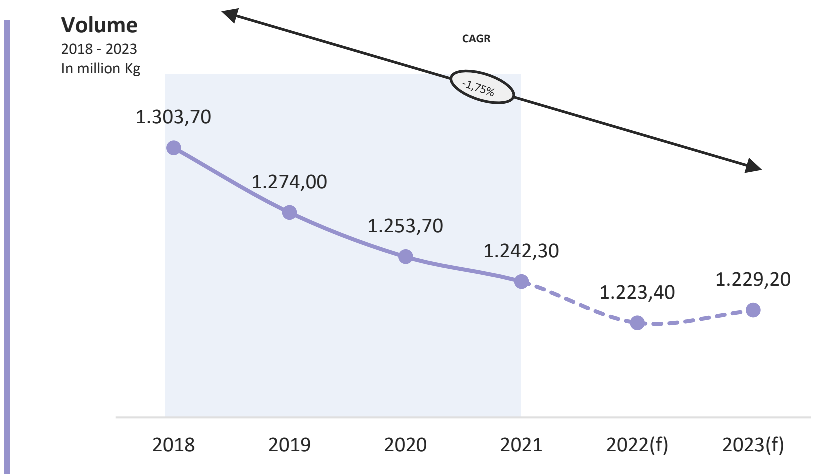
Average revenue per capita: total turnover/total population

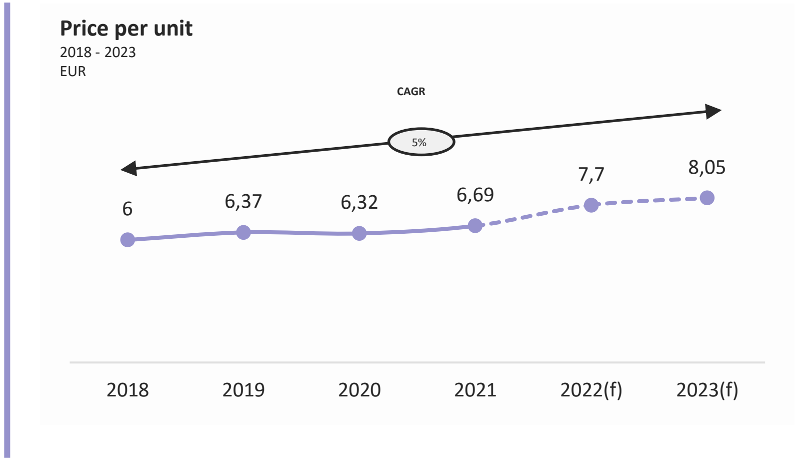
KID'S CLUSTER CEIV NOVA CHILD Lifestyle & Design Cluster. ekids Funded by the European Union

European Child Food market – Sales volume and prices

Key market players are constantly updating products to make them more attractive to both parents and babies, increasing the price of products in the sector.. As can be seen in the graph on the right, from 2018 to 2023 the average prices of baby food products are expected to rise by 5% (CAGR).

Even so, the volume of products sold in Europe has decreased since 2018, which means that less and less child food is sold at a higher price.





*The charts on this sheet take into account the products that are included in the sector definition on page 127 and are based on information from the 43 current countries in Europe

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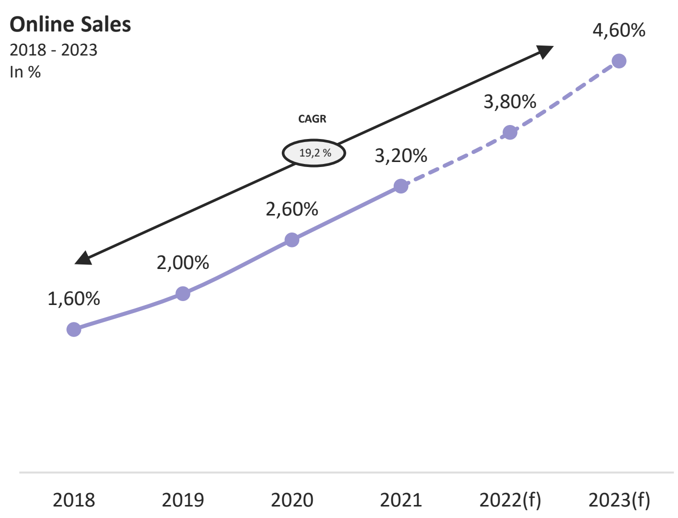
European consumer behaviour

The purchase of child products and child food on the internet has been consolidated among European consumers. Online food purchases for children have had a strong boom in the last two years, where the health emergency of covid-19 and social isolation forced many businesses to take a step forward towards the virtual world.



New purchasing channels

Online consumption of child food products has increased by 30% since the beginning of the pandemic. This, added to the increasingly symbiotic relationship between the child target and technology, shows an inevitable transformation in the market.

In 2021, **3.20% of the total sales** made in the sector were made from online shopping channels, such as e-commerces and specialized online supermarkets.

**The charts on this sheet take into account the products that are included in the sector definition on page 127 and are based on information from the 43 current countries in Europe*

Spain

Revenue

Average revenue per capita

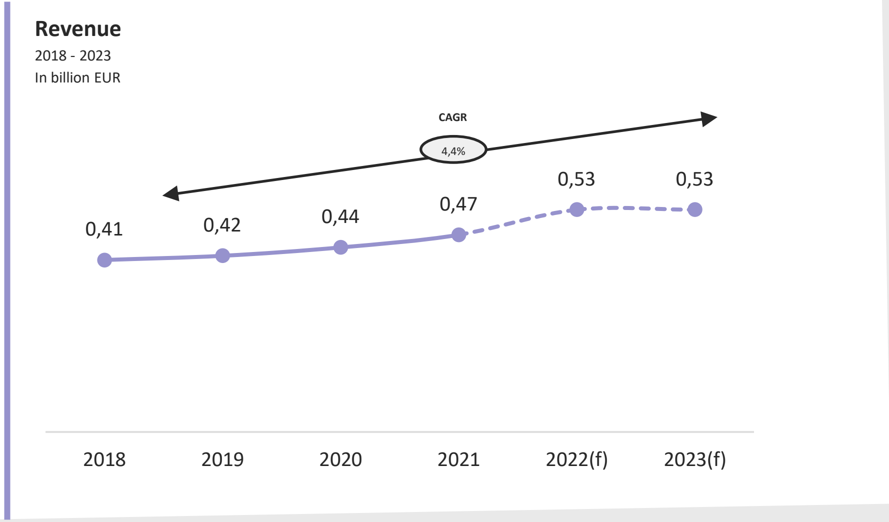
Volume

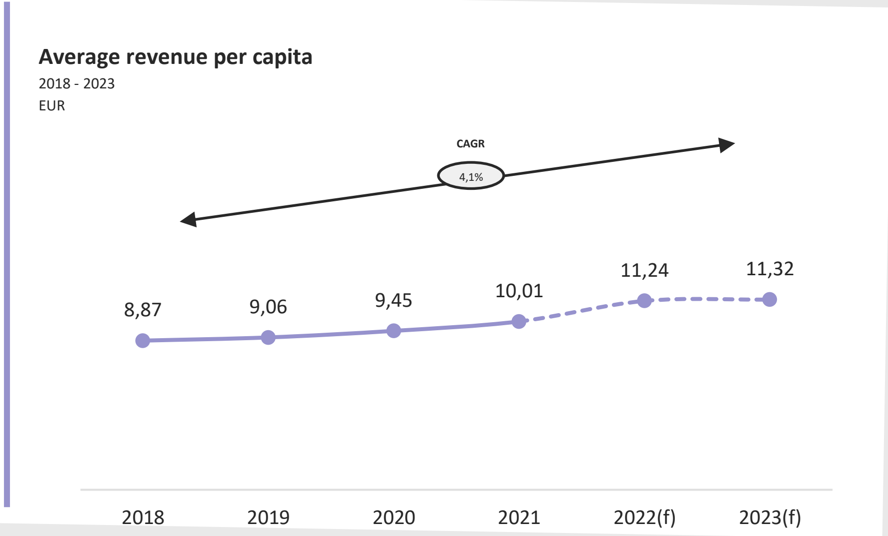
Price per unit

Online sales

Spanish Child Food market - Revenues

The sale of children's food in Spain closed the year 2021 with a total revenue of 0.47 In billion EURos, a total higher than the income achieved in pre-pandemic years. Although the total income is lower than in other countries, taking into account the small population of Spain and the purchasing power of its population, these are very optimistic figures for the market. The price that the entire Spanish population should pay to reach the levels of income generated and expected increases by 4.7% CAGR each year, due to an increase in prices.



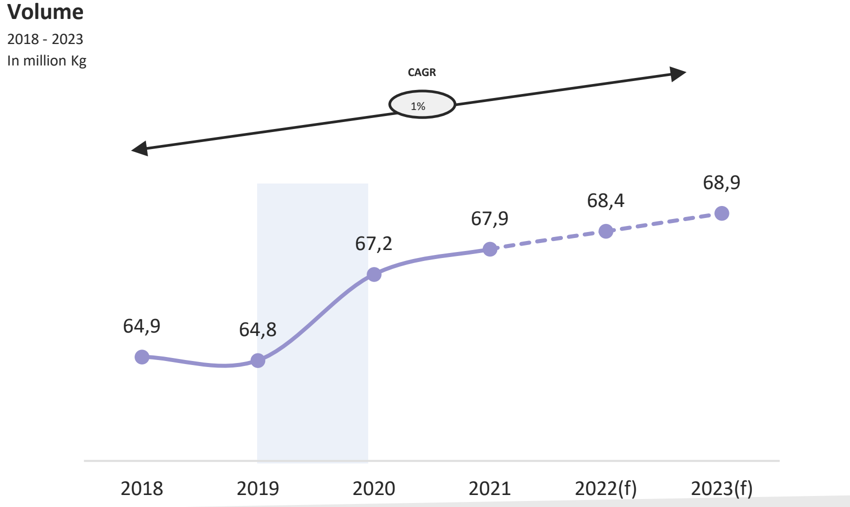


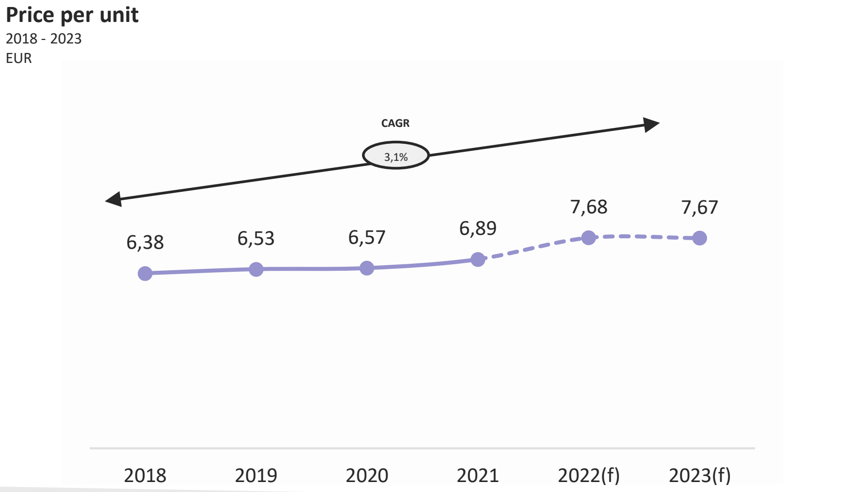
Average revenue per capita: total turnover/total population

Spain Child Food market – Sales volume and prices

The volume of sales generated as well as its increase are positive. It should be noted that between 2019 and 2020 the volume of sales increased by **3.7%**, a growth to be highlighted compared to the other years.

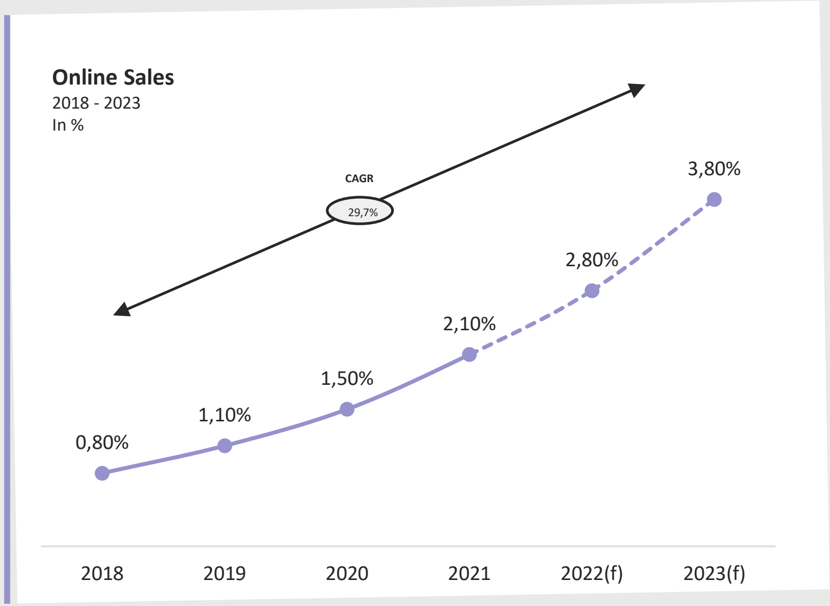
In the case of prices, as in other countries, they continue to rise and especially after the pandemic. Even so, the CAGR from 2018 to 2023 is lower than in other countries analyzed, being **3.1%**. The rise in prices explains also the rise in the average revenue per capita.





Spain Child Food market - Consumer behaviour

In Spain there is a somewhat paradoxical behavior because the frequency of traditional purchases is higher, but the money spent increases significantly online. Even so, the trend to buy baby food products online grows by **29.7% from year to year (CAGR)**, expecting that in 2023 online purchases in this sector will reach **3.80% of total sales**.



New purchasing channels

When analyzing the main reason that moves Spaniards to buy online:

- 86% are inclined to practicality and comfort
- Closely followed by the ease of use manifested by 84% of users.
- On the other hand, 80% believe that there is a greater range of products
- 79% prefer online shopping for time savings, offers and promotions

France

Revenue

Average revenue per capita

Volume

Price per unit

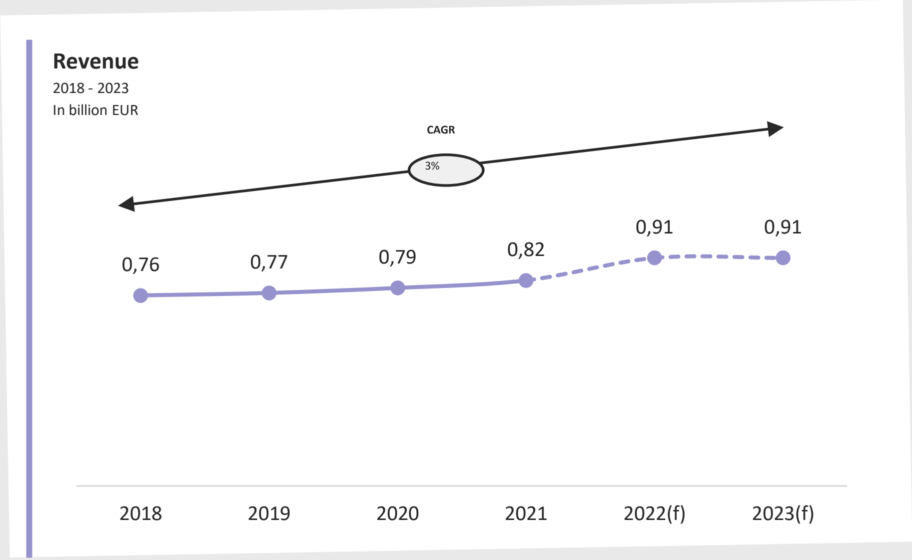
Online sales

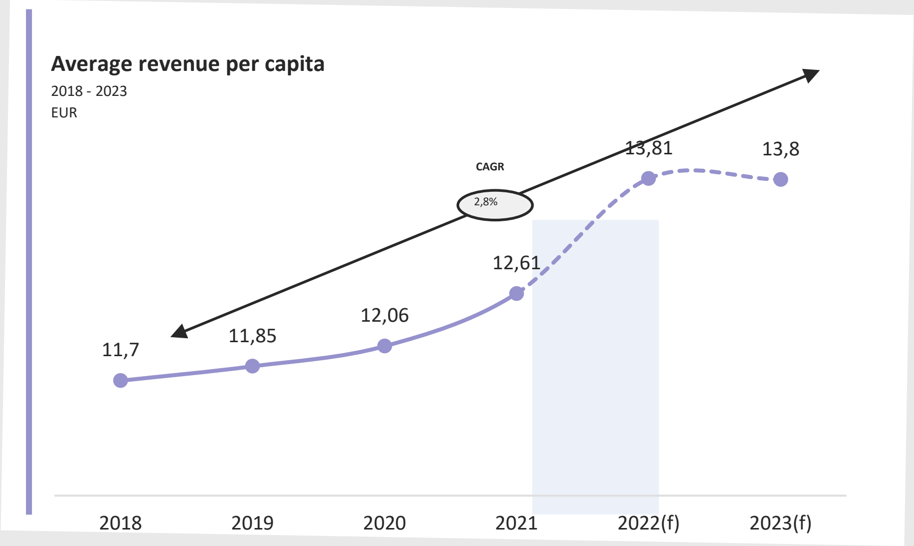
French Child Food market - Revenues

The importance of the country in the European panorama is evidenced in the total income generated by the child food sector, which presents high figures. In 2021, total revenue was €0.82 Billion.

Total revenue is expected to increase in the coming years (until 2023) by a 3% compared to 2018 data.

To reach the expected totals, the average annual revenue per capita has to increase, supported by an increase in prices.

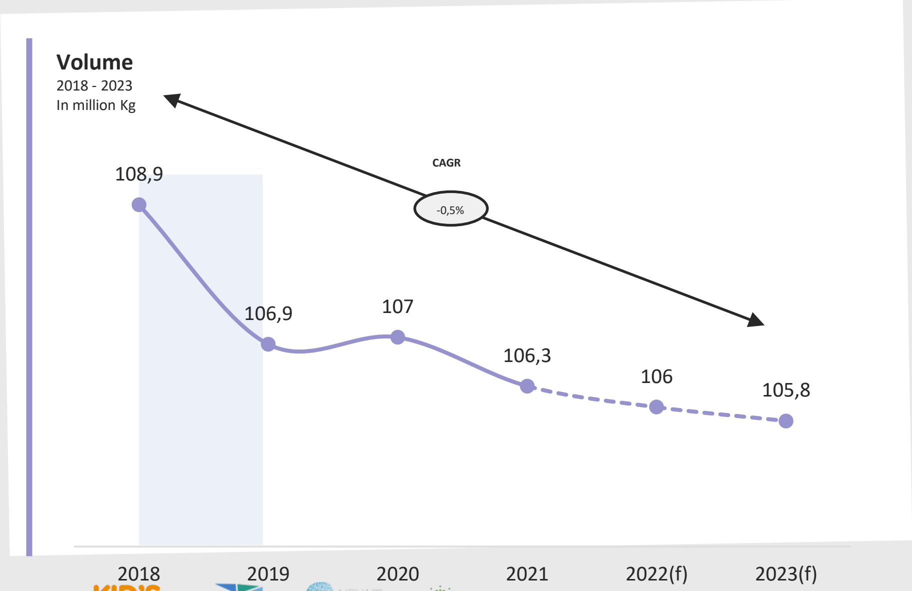


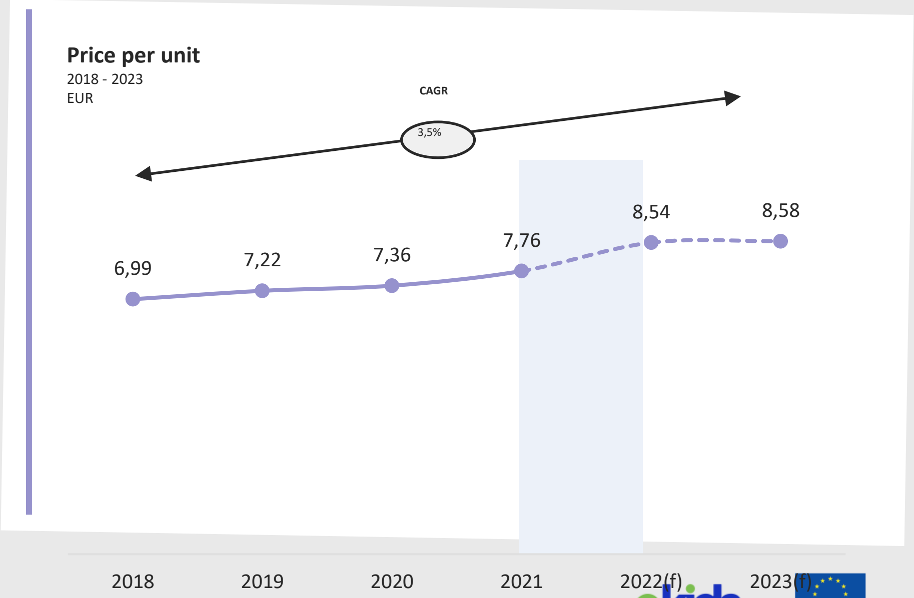


French Child Food market – Sales volume and prices

Although the data on the total revenue of the sector are optimistic, the market is affected by a rise in prices, as it influences the total volume of sales generated, which decrease since 2018.

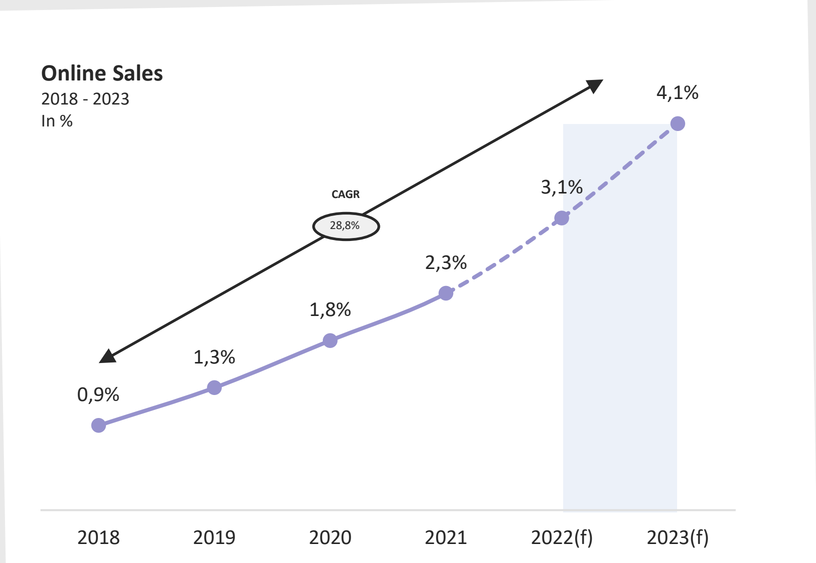
Even so, the rise in prices influences the increase in income, because even if less is sold, the products sold are sold at a higher price, generating more money.





French Child Food market - Consumer behaviour

France is one of the countries analyzed with a more developed child food market, because as seen in the graph, the percentages of online sales respect to the total sales generated is higher than in other countries. In addition, it is a potential market, as it grows optimistically with a CAGR of 28.8% since 2018.



https://ecommercedb.com/en/markets/fr/all

New purchasing channels

69% of the French population have bought at least one product online in 2021.

The food & Personal Care segment (which includes baby food) remains an **14%** of the total e-commerce consumption in France.

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Italy

Revenue

Average revenue per capita

Volume

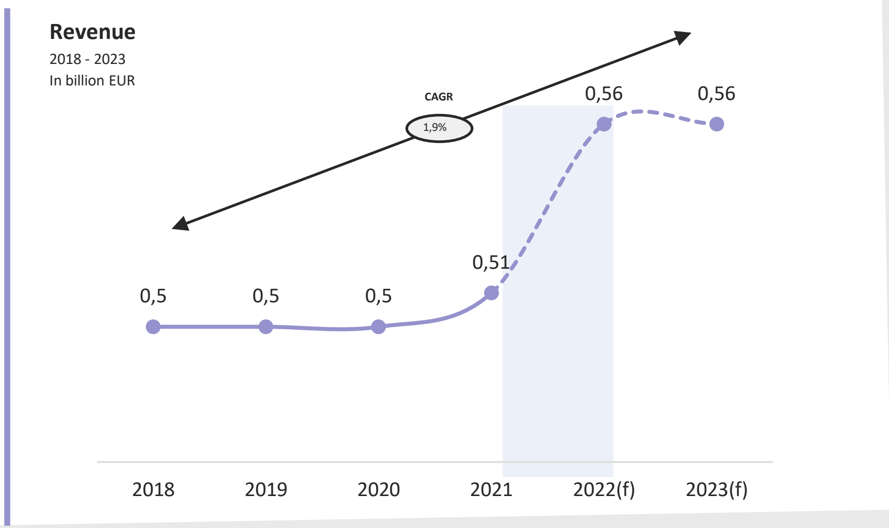
Price per unit

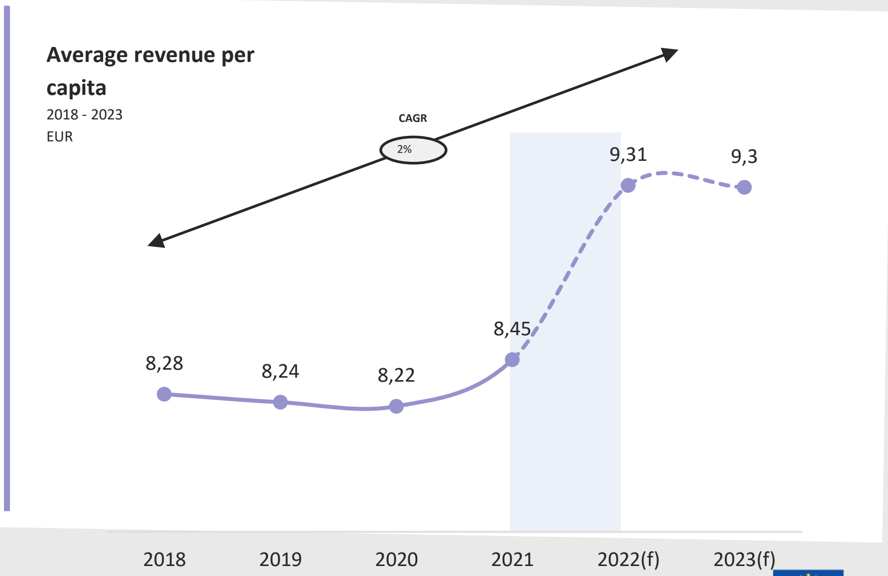
Online sales

Italian Child Food market - Revenues

The child food market of Italy is one of the markets that enters less money at European level and taking into account the countries analyzed.

In 2021 the total revenue generated by the sector was €0.51 billion, but it is expected that in 2022 and 2023 these revenues will reach the figure of €0.56 billion, due to the growth in the average annual revenue per capita.





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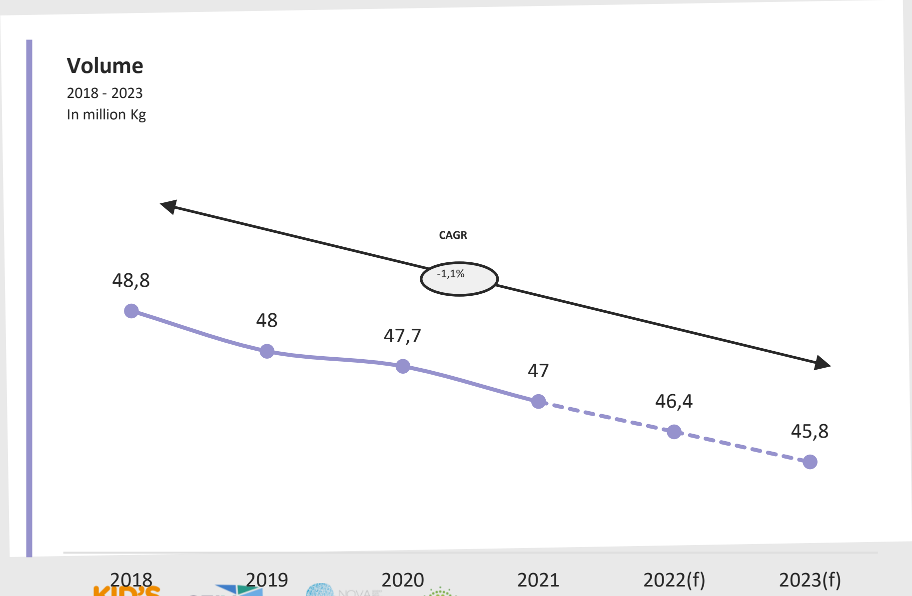
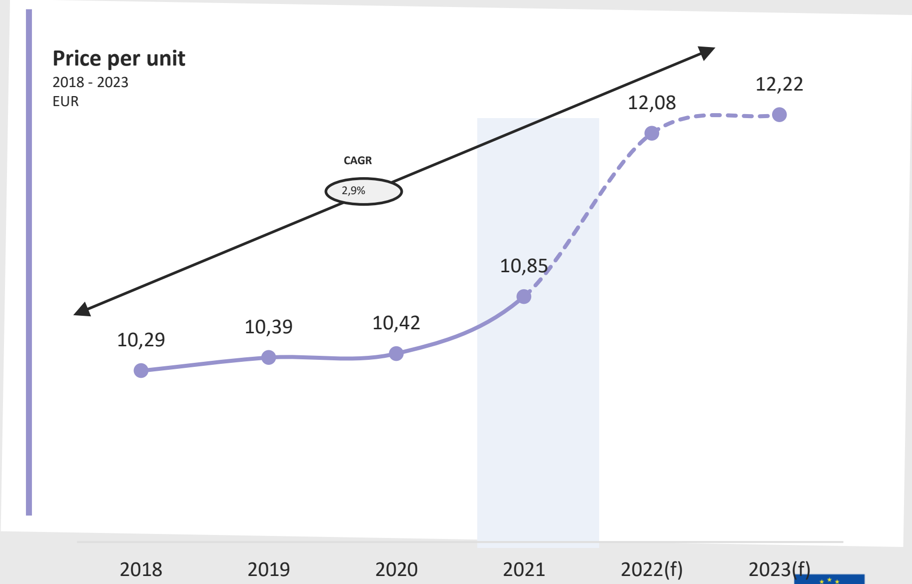
Italian Child Food market – Sales volume and prices

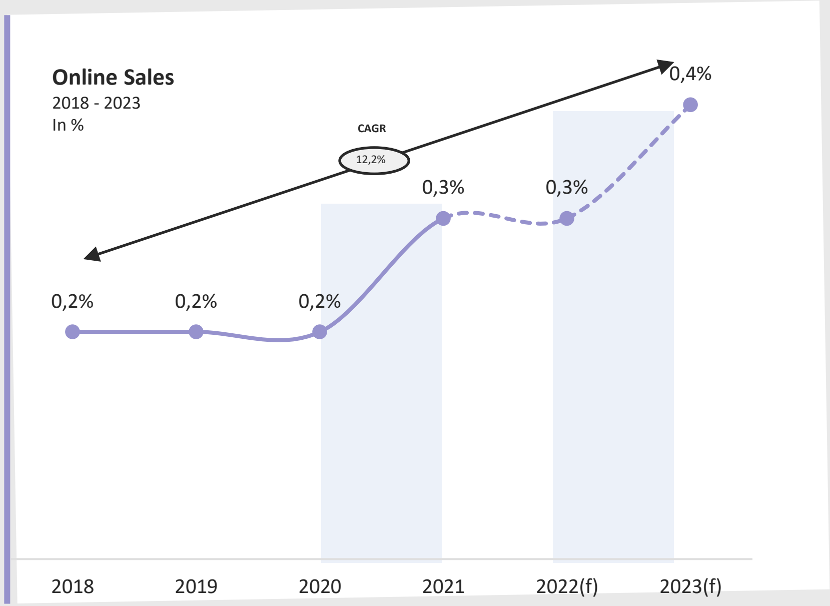
Due to the high price growth that 2022 and 2023 (12,08€/unit and 12,22€/unit respectively) are expected to present, the volume of sales generated in the sector is expected to decrease accordingly, reaching 45.8 In million Kg of products sold in 2023, a 2,5% less than the volume sold in 2021.





Italian Child Food market - Consumer behaviour

The Italian child food eCommerce market is not as developed as that of other European countries, which leads to low percentages of online sales of child food products. Nevertheless, online sales are expected to increase over the next years. Since 2018, the yearly growth rate has been 12,2%, expecting it to remain until 2023 and reaching 0.4% of the total sales made in the sector by this year.



New purchasing channels

52% of the Italian population have bought at least one product online in 2021.

The food & Personal Care segment (which includes baby food) remains an **15%** of the total e-commerce consumption in Italy.

Denmark

Revenue

Average revenue per capita

Volume

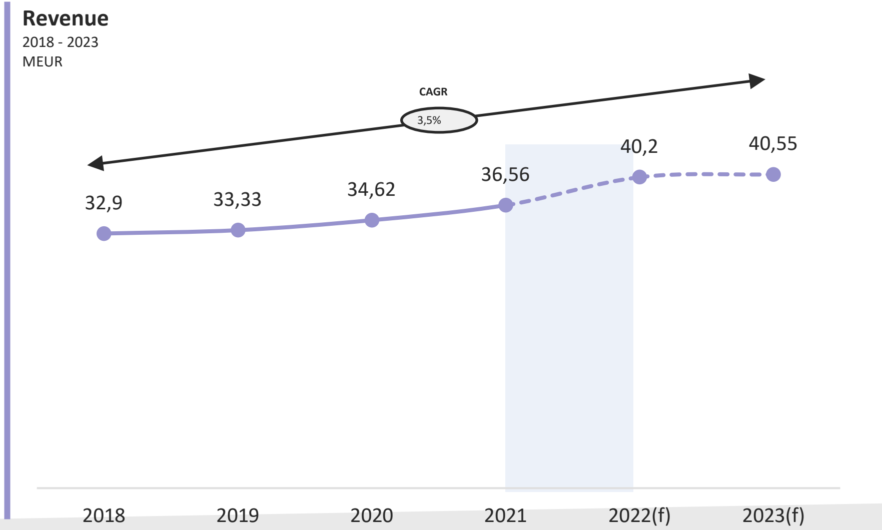
Price per unit

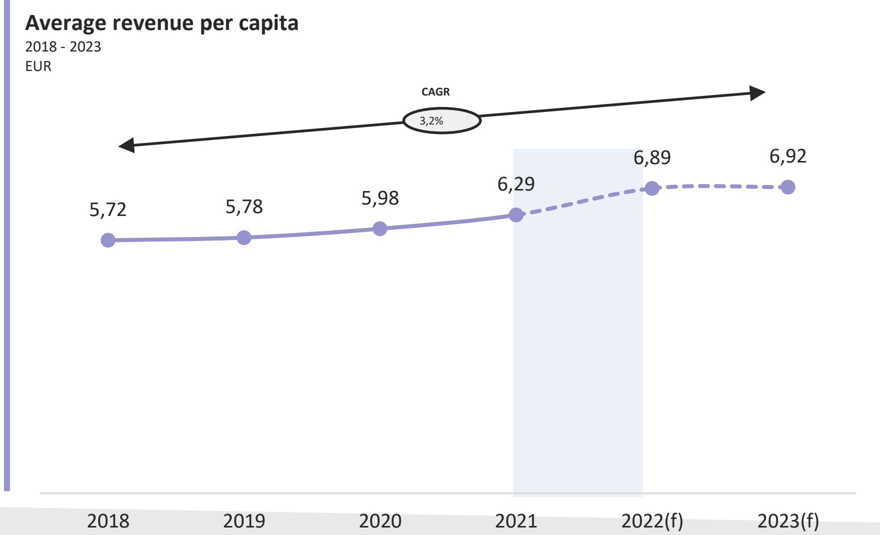
Online sales

Danish Child Food market - Revenues

Denmark, due to the small size of the country, has lower income levels compared to other countries. Even so, due to the purchasing power of the population, prices are relatively high, which implies that the country's annual revenue per capita is high.

Despite the variables that the country presents, the sector's income figures are optimistic, growing year-on-year by **3.5%** since 2018.

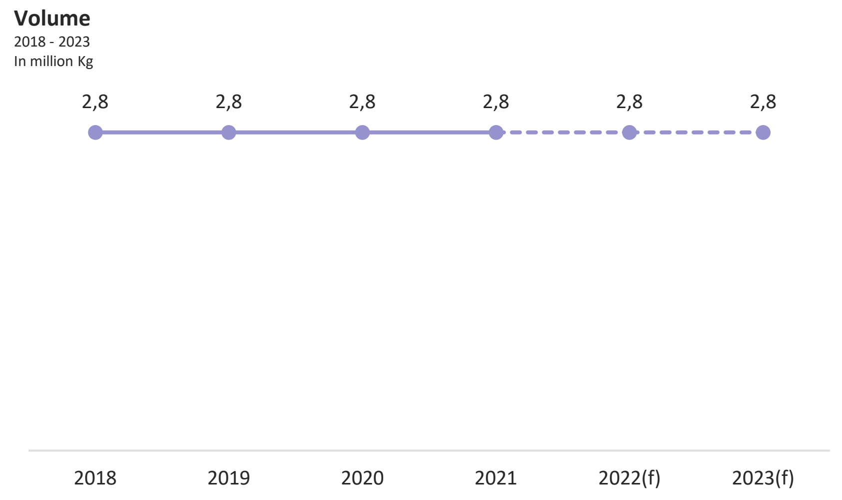


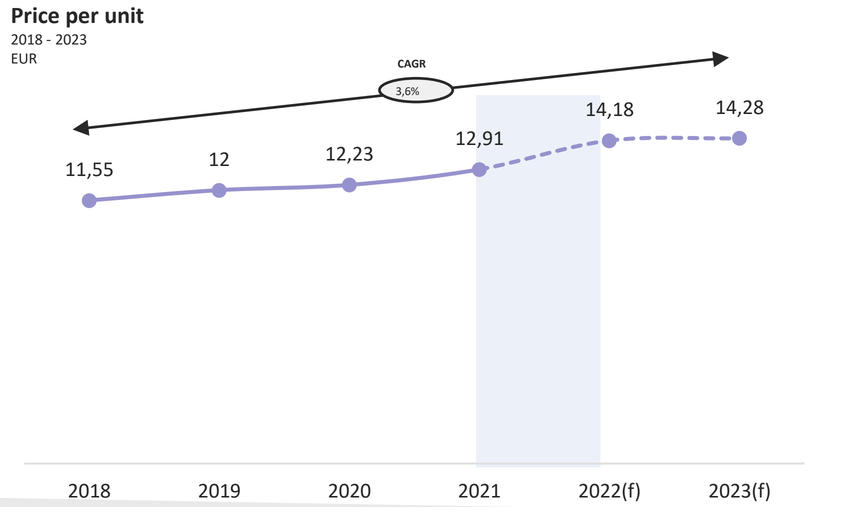


Funded by the European Union

Danish Child Food market – Sales volume and prices

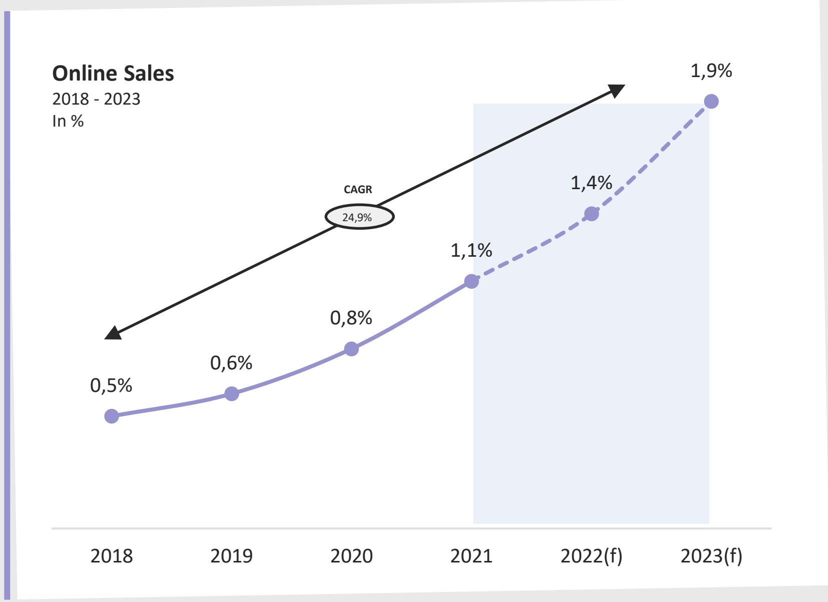
The Danish country stands out for sales generated in the child food sector, as it remains constant since 2018 with a total of 2.8 In million Kg in sales volume, despite an increase in the price, which in 2021 was positioned at **€ 12.91**.per unit, **a 5.5% higher than the unit price of the previous year**.





Danish Child Food market - Consumer behaviour

Denmark child food eCommerce sales are expected to increase over the next years. Since 2018, the yearly growth rate has been **23.9%**, expecting it to remain until 2023 and reaching **1.9% of the total sales made** in the sector by this year.



New purchasing channels

67% of the Danish population have bought at least one product online in 2021.

The food & Personal Care segment (which includes baby food) remains an **8%** of the total e-commerce consumption in Denmark.

https://ecommercedb.com/en/markets/dk/all

Germany

Revenue

Average revenue per capita

Volume

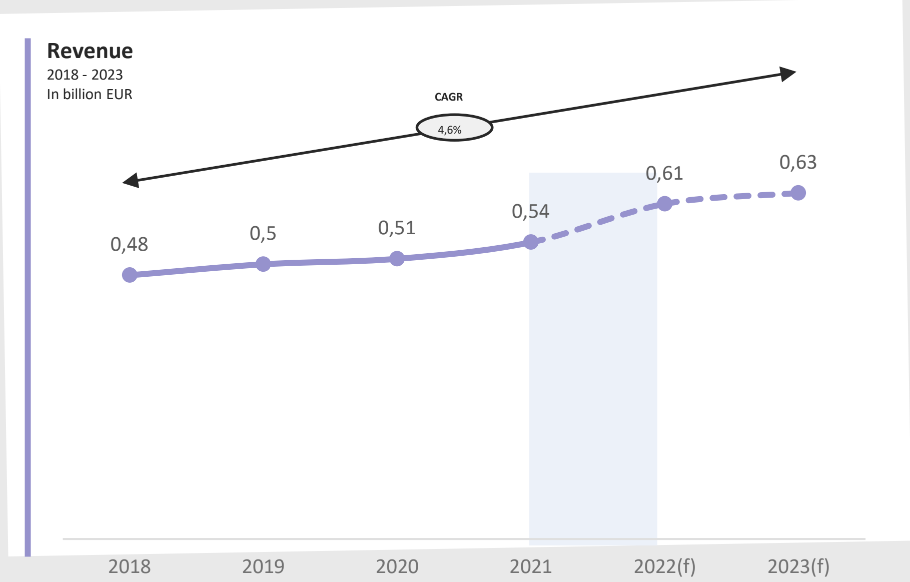
Price per unit

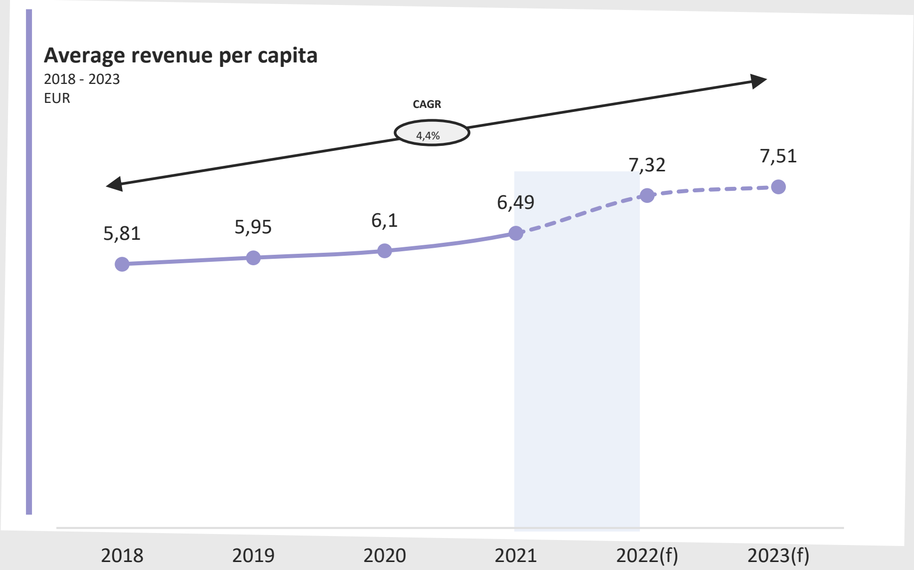
Online sales

German Child Food market - Revenues

Germany, due to its importance and purchasing power of the population, is among the countries that generate the most monetary income in the European child food market.

In 2021, revenues were **€0.54 billion**, a figure that is increasing in 2022 sharply. Even so, the average annual revenue per capita, as in all countries, grows uninterruptedly, making it difficult for the industry to acquire the same income levels with the same money contributed by the population.





Average revenue per capita: total turnover/total population

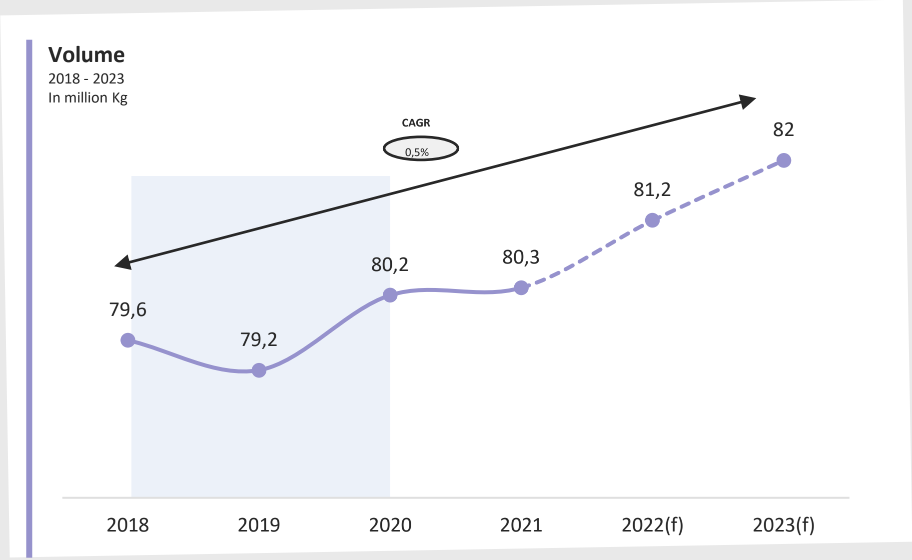
Funded by the European Union

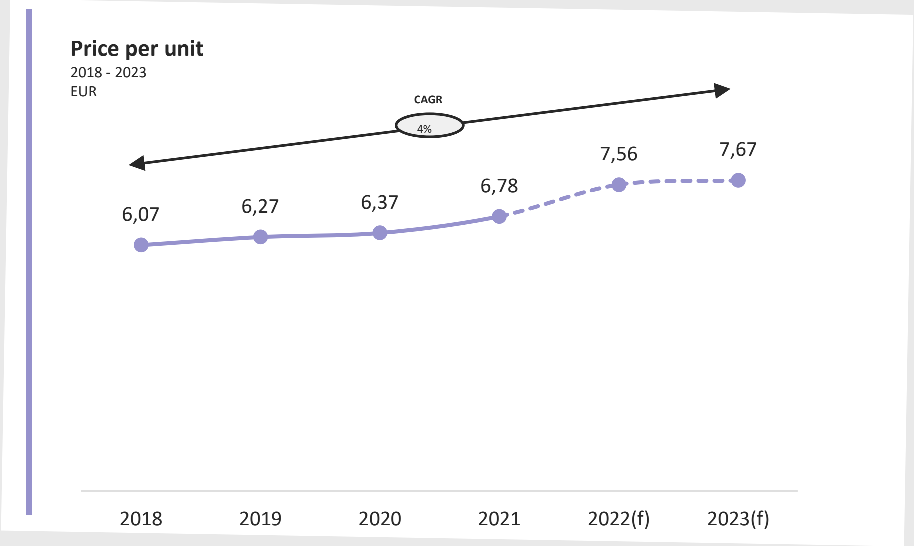
German Child Food market – Sales volume and prices

In the case of sales volume, Germany is experiencing a very slow growth, with only a **CAGR** of **0.5%**.

The growth of average prices per unit, however, it is expected to grow by **4%** through 2023 compared to 2018.

The rise in prices slows down the number of sales generated by the sector, as prices influence the population.





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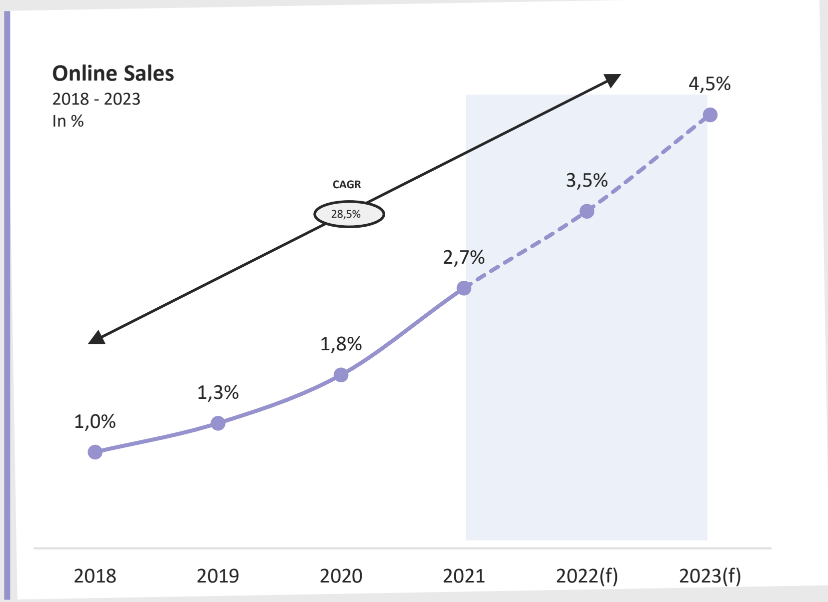
German Child Food market - Consumer behaviour

Germany is the fifth largest market for eCommerce, placing it ahead of South Korea and behind the United Kingdom.

The childfood's eCommerce market in Germany is expected to increase over the next few years.

It has been predicted that the compound annual growth rate for the next four years will be **28,5% CAGR**.



New purchasing channels

In 2019, online child food sales accounted for less than 2% of total German child food sales. Various players are attempting to grow into the rest of the market.

The growing number of large and small online supermarkets is growing, assuming at the same time an increase in the percentage of online sales from now on.

Poland

Revenue

Average revenue per capita

Volume

Price per unit

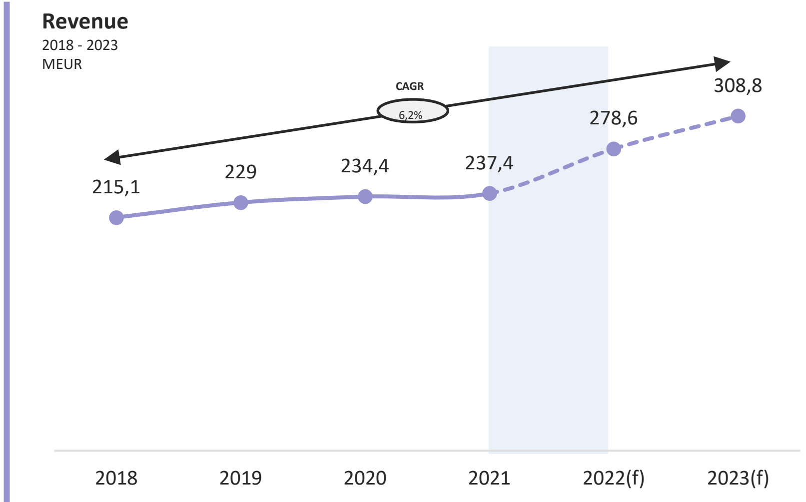
Online sales

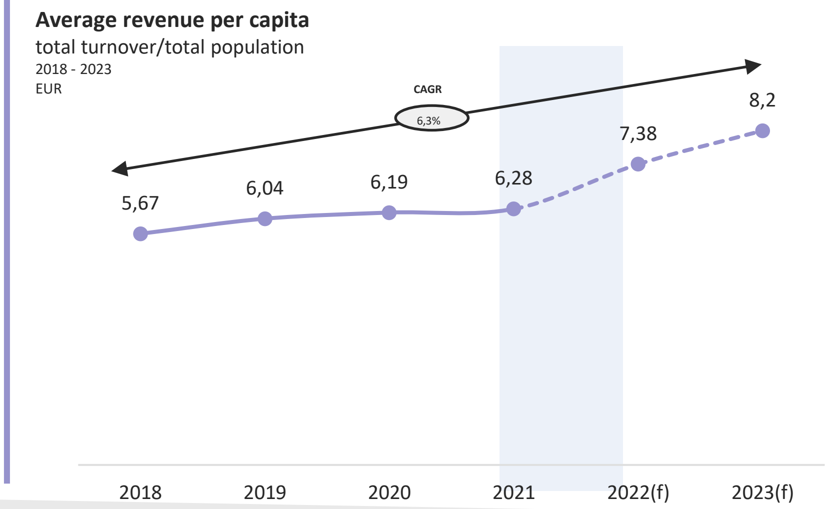
Polish Child Food market - Revenues

Poland's revenue generated from the sale of baby food products grows exponentially significantly with a **CAGR of 6.2%.** Even so, the country's market generates proportionally low incomes to other countries.

It highlights a rise of **17.35%** between 2021 and 2022 that motivates the market growth.

The average annual revenue per capita grows at the same rate as the average prices per unit of products.

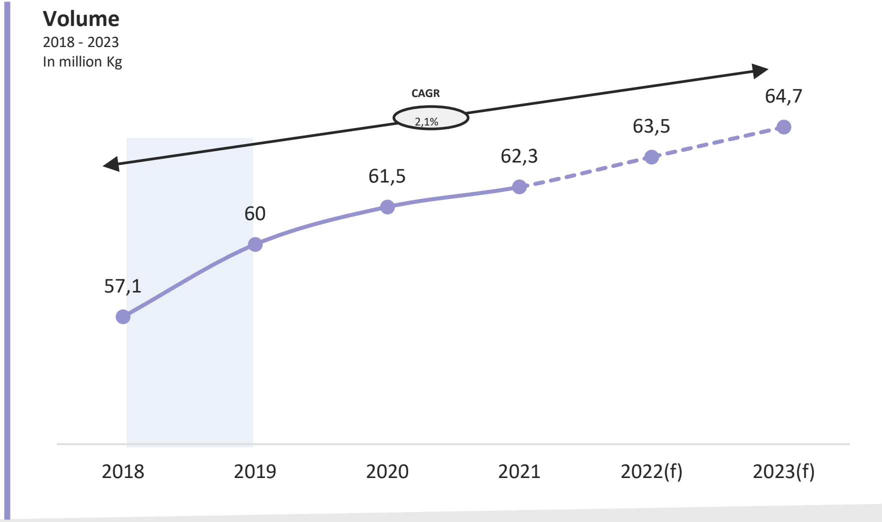


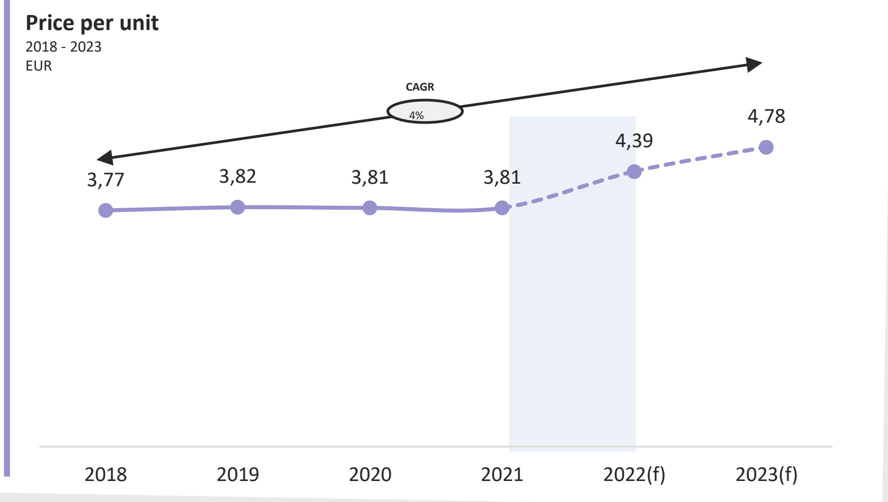


Polish Child Food market – Sales volume and prices

The growth in the volume of sales made in Poland remains on average with that of other countries analyzed. Between 2018 and 2019 the growth was remarkable, as it increased by **5.07%**. Although with lower growth, the market is expected to grow in terms of volume by **2.1% CAGR** (year-over-year growth) if the year 2018 and the forecast of 2023 are taken as a reference.

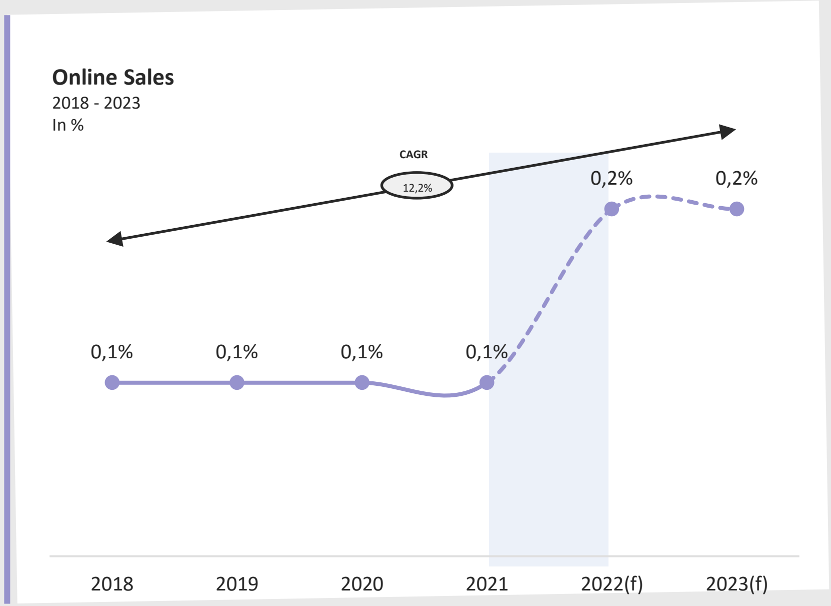
The slow growth in sales per year can be justified, in part, by the increase in prices, which specifically between 2021 and 2022 increased sharply by **15.22%.**





Polish Child Food market - Consumer behaviour

The e-commerce market in Poland remained steady during the pandemic. The unprecedented shift to remote work greatly increased Poland's digital skill set, and restrictions on the ability to shop in person further drove a shift in Poland's consumer habits, that until 2022 has not been reflected in the increase in purchases of child food online.



New purchasing channels

According to the Polish Statistical Office, 92.4% of all households and 99.5% of households with children had internet access in 2021.

The fastest growing segments of the e-commerce market are grocery sales (children's food included), although this has slowed down a bit since restrictions were relaxed by the pandemic.

Between 2018 and 2023 this growth is expected to be 12.2% year-on-year (CAGR).

Slovakia

Revenue

Average revenue per capita

Volume

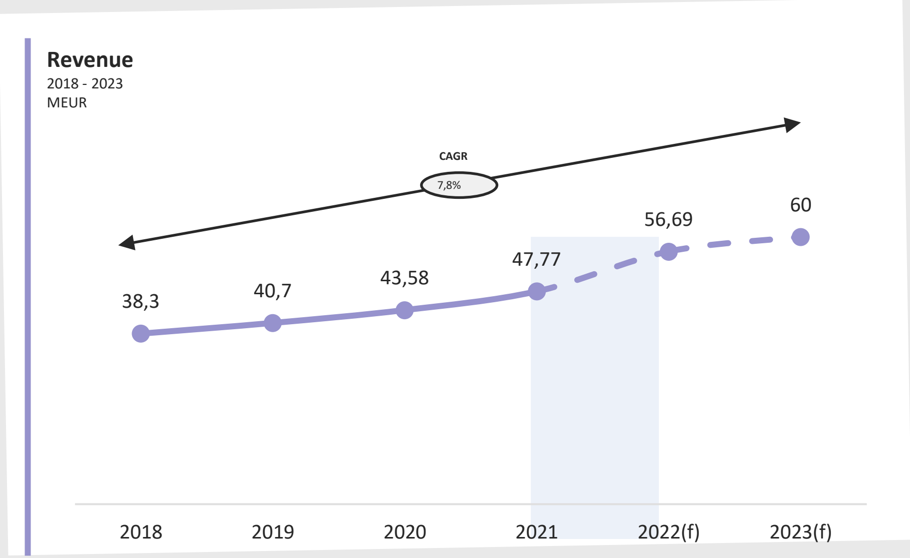
Price per unit

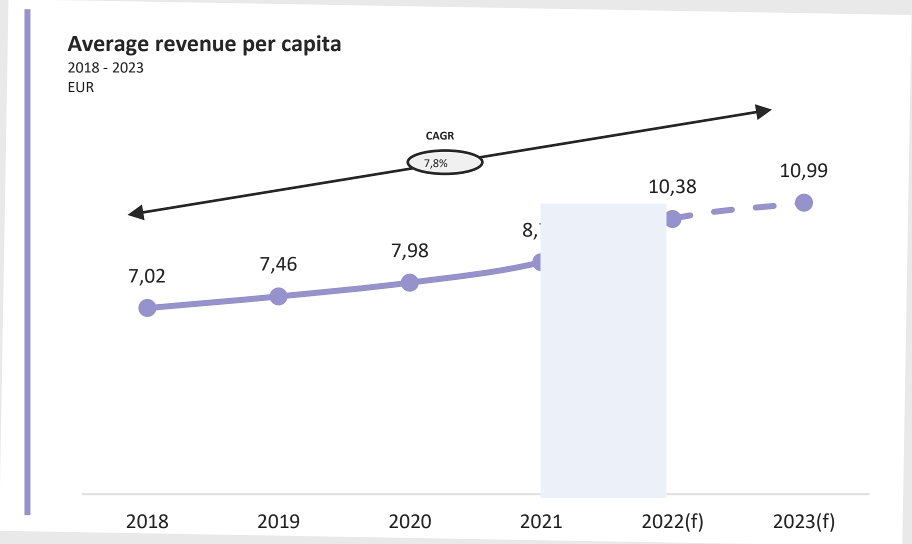
Online sales

Slovak Child Food market - Revenues

The sales of children's food in the Slovak market has grown steadily since 2018 having a **CAGR of 7,8%.** The prevision for this 2022 is that the growth will be the bigger in the last years arriving to a total of **56,69 million Euros.**

Looking at the revenue per capita we can affirm that it's stable as the general revenue, **having the same CAGR.**



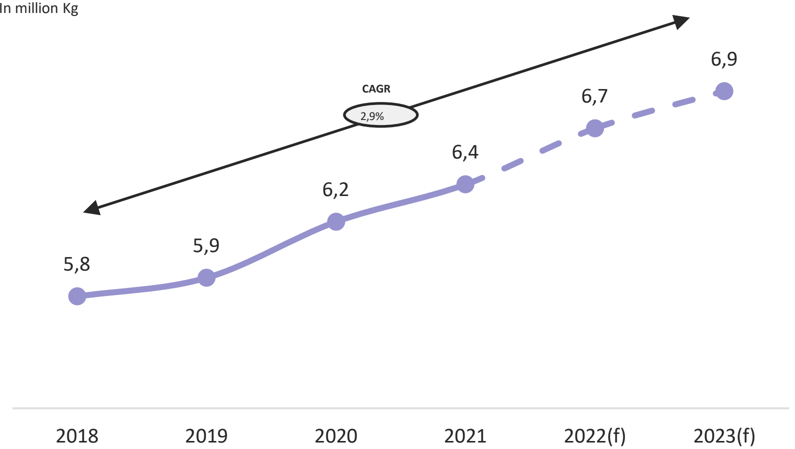


Slovak Child Food market – Volume of sales and prices

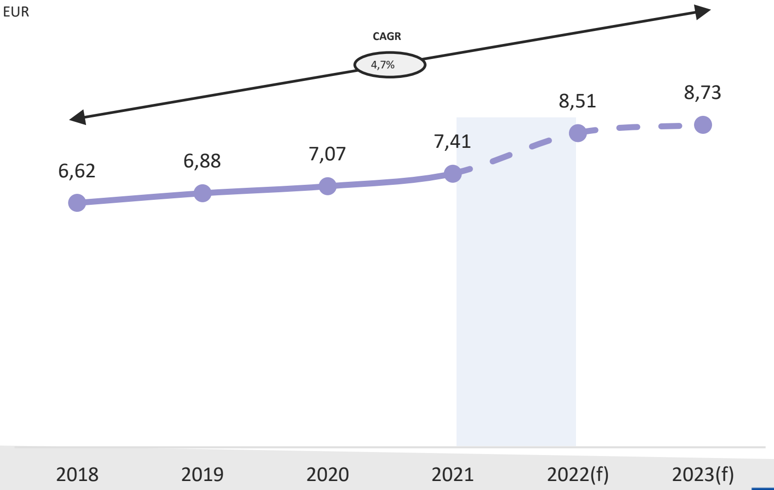
Volume of child food in Slovak's market have been growing almost **linear since 2018**, and the prevision of the market is to maintain this trend for this **2022 arriving to 6,7 In million Kg** and in **2023 the prevision is a total of 6,9 millions** and, having a **CAGR of 2,9%.**

Looking at the price per unit this has also increased but less than the volume. The prevision said that the **biggest grout will be this year achieving the total of 8,51 euro**

Volume
2018 - 2023
In million Kg

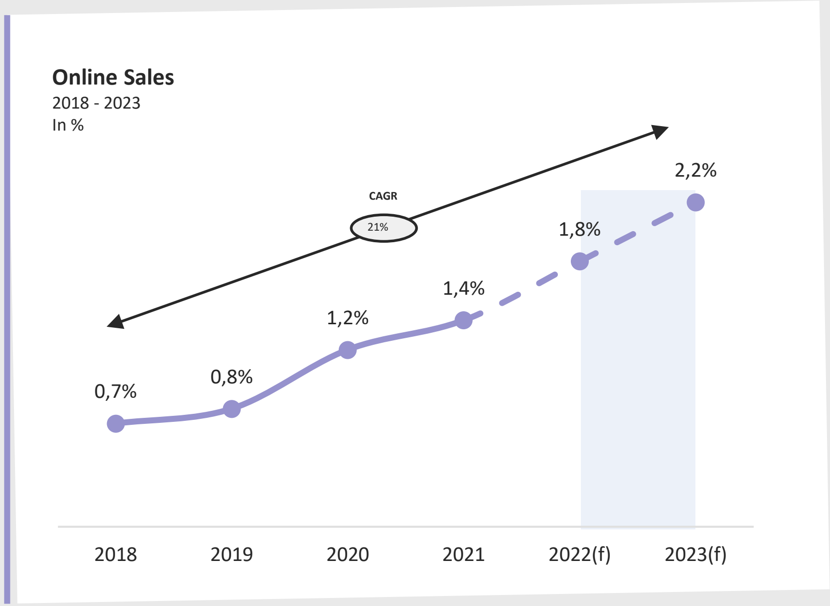


Price per unit
2018 - 2023
EUR



Slovak Child Food market - Consumer behaviour

Looking at the consumer behaviour the buyers still prefer to buy this kind of products offline, but the tendency is growing with a CAGr of 21%, but still a symbolic part of the total buys.



New purchasing channels

46%of the Slovak population have bought at least one product online in 2021.

The food & Personal Care segment (which includes baby food) remains an **10%** of the total e-commerce consumption in France.

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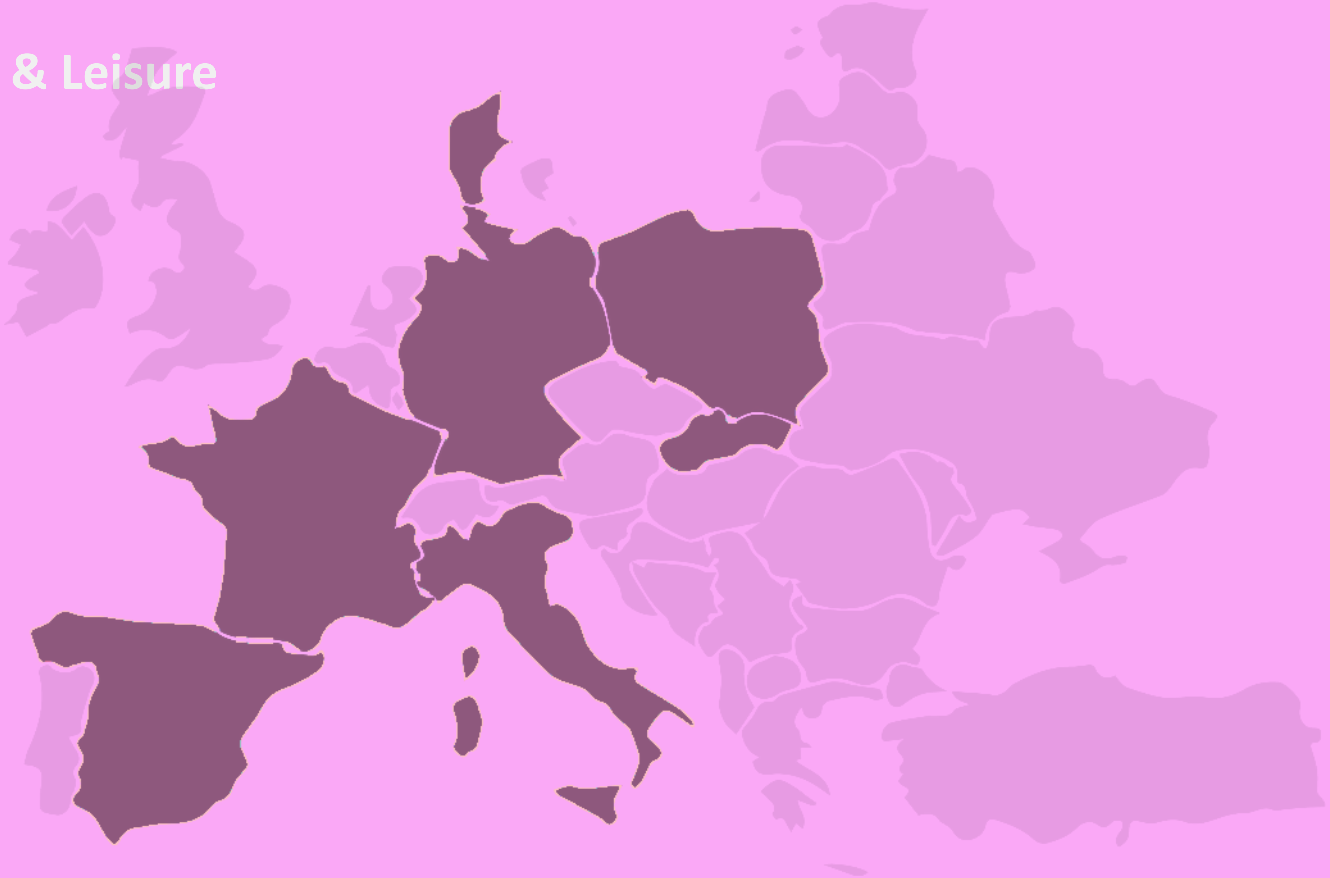
2.2.4. Entertainment & Leisure



Facilities and management of children's and youth leisure experience spaces (Water and Amusement Parks) and audiovisual material aimed at children and young people.

Key findings

- In terms on revenue, **generic TV is still a significantly larger market in Europe compared to streaming VOD services**: traditional TV and home video generated 81,2 Billion € compared to 7,2 Billion € forecasted for VOD services in 2021. However, traditional television revenue is gradually decreasing in all the region (-1,5% CAGR 2018-2023), while **video on demand streaming services are expected to grow at a significant 10,8% CAGR** in the same period.

- Revenue for generic broadcast tv still come **mainly from advertising** in Spain, but in some markets such as Denmark, Poland, Slovakia or Italy, **pay TV subscriptions** bring more income than ads. In other countries, such as Germany, the main source of revenue are **public tv license fees**.

- **Netflix is the leading streaming service in the region**, followed closely by Amazon and Disney (with some differences depending on the market). Apple + has a smaller share in most European countries compared to their position in the US. **Some countries have regional streaming services with smaller audience shares** than global services.

Children's entertainment offerings

- Up to 7% of European television channels are aimed at children, compared to 14% of channels available devoted to sports or 7% devoted to music.

- Different children's channels have the largest audience in each country, there are **no top regional children's TV channel brands**, although **some global brands** such as Nickelodeon or Disney are present in several countries.

- There are also **44 child-focused on-demand audio-visual services in Europe** (compared to 385 generalist services or 36 sports-focused services).

Screen time & behaviours

Several studies in different countries can help us have some **insight into European's children screen time**:

- A recent study shows that French **children under 6 are spending around 6h each week online, 6h watching television and 4h gaming**. For those **between 7 and 12 years old, screentime increases to over 9h online, 9h watching tv and over 6h gaming**.

- Data from Italy shows that **the largest audience TV among kids are those aged 6 to 10 years old**, probably due to older children diversifying their screen time to include online surfing and gaming.

- A Danish 2018 study shows that **6% of 11-year-old girls and 7% of boys were already spending at least 4h on social media daily**. By the time they were 13, these numbers had increased to 22% for girls and 14% for boys.

- The cinema is still a relevant entertainment service for European kids, at least in some countries where data is available. In France, **16% of movie-goers were children between 3 and 14 years of age**, the third segment by age after 15- to 24-year-olds and those 60 or over.

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Leisure activities & parks

- European children's favourite activities include **meeting with friends, playing outside or enjoying sports activities**. Preferences are **similar across genders**, with some differences: a higher percentage of boys prefer sports and digital games, while girls prefer activities with animals or arts & crafts more than boys.

- **France has 5 of the most visited amusement parks in the region**, including the most visited Disneyland Park. **Germany also has 4 of the top European amusement parks, as well as 3 of the top water parks** in the region.

- The amusement park industry has been severely impacted by the effects of the pandemic, with restrictions and closures, losing up to 80 or 90% of their visitors in 2020 compared to 2019.

- Revenue also fell dramatically: **amusement parks in Germany lost 68% of their revenue in 2020** compared to the year before. The market is **slowly recovering, with revenue expected to exceed pre-pandemic levels by 2023**, with a **3,14% CAGR** 2018-2023.

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Europe

Favorite entertainment & leisure activities

Subscription Video on demand revenue forecast

Traditional TV and Home Video revenue

Global share of subscribers to selected popular streaming services

On-demand audiovisual services by genre

Share of TV channels established

Amusement Parks attendance

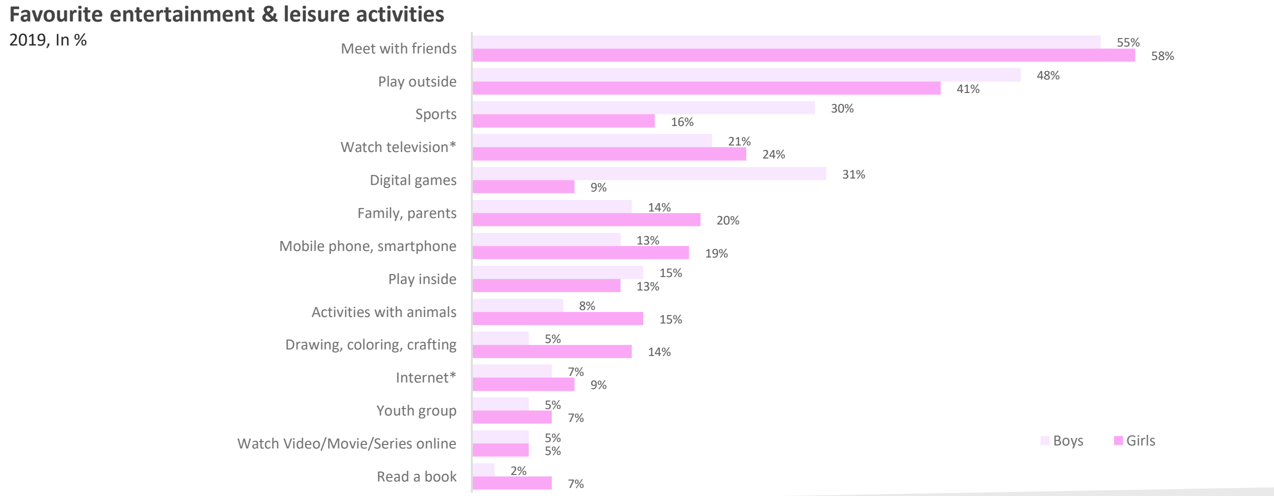
Water Parks attendance

Ticket prices of leading Amusement Parks

Ticket prices of selected Water Parks

European entertainment & leisure behaviour

The favourite leisure activities of European children are "meet with friends"” and “play outside”, for both boys and girls. On the other hand, the leisure segments that children like the least are “read books” o “watch videos/movies/series online”.



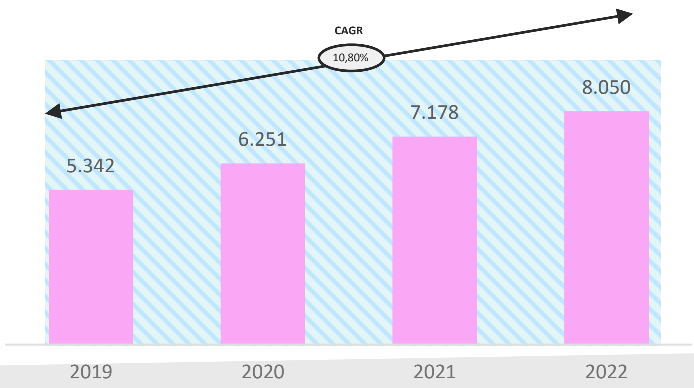
European entertainment market - VOD and Traditional TV

Total revenue from subscription video on demand (SVOD) was about **7.178 in 2021** and will continue to see yearly growth in Europe until at least 2022, according to the latest forecast. The expected growth between 2019 and 2022 is 10.80%.

In terms of revenue from traditional television and home video, the Pay TV is the sector that generates the most money overall, and in 2021 it billed a total of **€34.43 billion**. European television in general billed a total of **€81.24 million**, considering all segments of the chart.

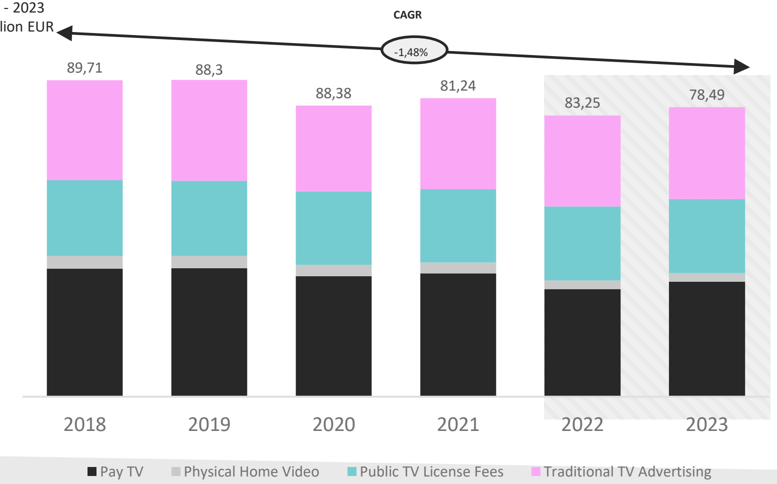
Subscription Video on demand revenue forecast

2019 - 2023
MEUR



Traditional TV and Home Video revenue

2018 - 2023
In billion EUR



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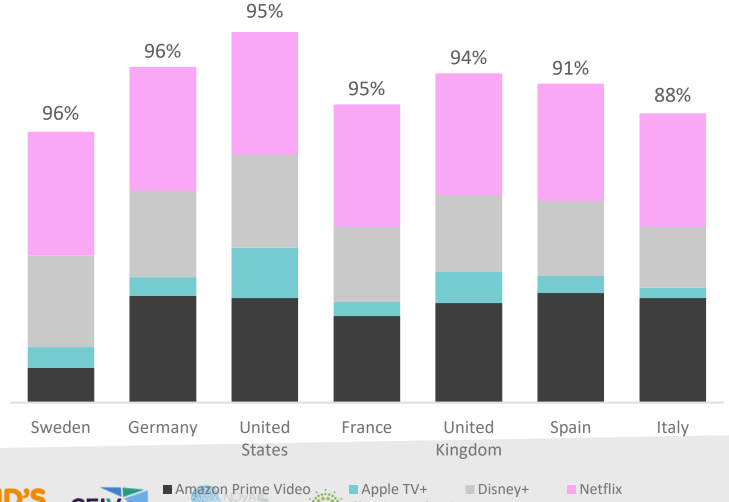
European entertainment market – Audiovisual and Streaming Services

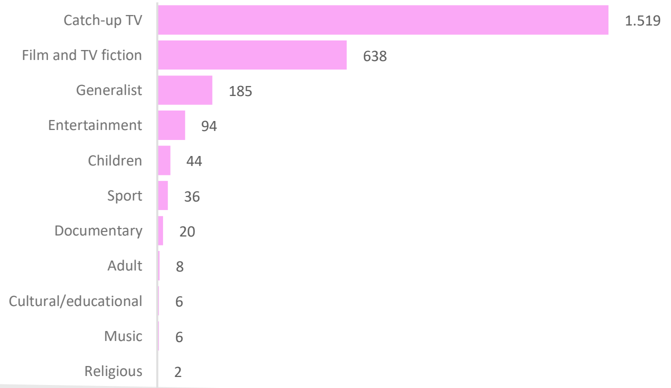
As can be seen in the graph on the left, which includes some of the countries analyzed in the report, generally the leading streaming service by the European population consuming this type of service is **Netflix** while the segment with a smaller share **is Apple Tv +.**

In the European continent, there are a total of **44 on-demand audiovisual services for children**, placing in the **5th position** in terms of number of services compared to other on-demand segment, which can be also seen in the graph on the right.

Global share of subscribers to selected popular streaming services
September 2021
In %

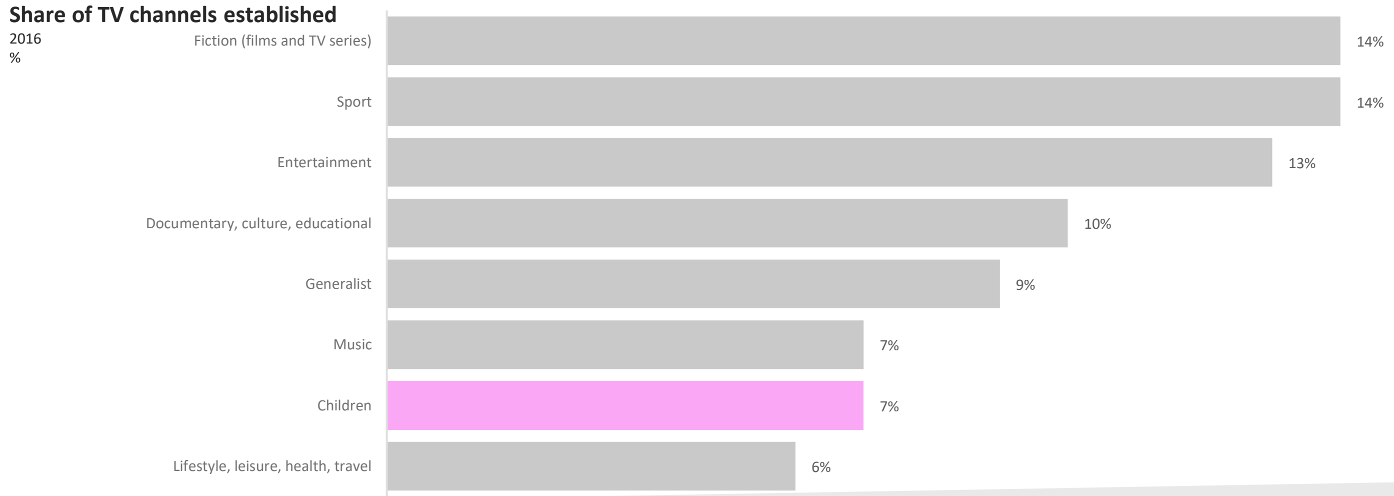


On-demand audiovisual services by genre
2019
EU 28
In number of services



European entertainment market – Children's TV channels

The graphic below shows the share of television channels established in Europe, broken down by genre. As of October 2016, children channels focused on films and TV series accounted for **7% percent of all European TV channels**.



European leisure market – Amusement Parks attendance

The graph below shows the most popular amusement parks, in terms of attendance, in Europe in 2020. France, Germany, Denmark and Italy (countries analyzed) are among the top countries with the most popular amusement parks. In 2020, France was the country with the most visited amusement park with DisneyLand Park and Walt Disney Studios Park (**4,03 million attendants**). . Europa Park, a German amusement park, is the third park in the ranking, where **2.5 million attendants** came in 2020.

AMUSEMENT PARKS	COUNTRY	2020	2019	CHANGE
De Efteling	the Netherlands	2,9	5,2	-68%
Disneyland Park	France	2,62	9,7	-69%
Europa Park	Germany	2,5	5,7	-81%
Tivoli Gardens	Denmark	1,63	4,5	-64%
Walt Disney Studios Park	France	1,41	5,2	-56%
Gardaland	Italy	1,35	2,9	-53%
Parc Asterix	France	1,16	2,3	-60%
Phantasialand	Germany	1	2,05	-44%
Heide Park	Germany	0,95	1,7	-51%
Puy du Fou	France	0,92	2,3	-50%
Futuroscope	France	0,9	1,9	-53%
Legoland	Germany	0,75	1,7	-73%
Legoland	Denmark	0,7	1,95	-64%
Port Aventura	Spain	0,7	3,75	-56%
Alton towers	UK	0,67	2,13	-73%
Thorpe Park	UK	0,6	1,9	-44%

Attendance in Million

European leisure market – Water Parks attendance

The graph below shows the most popular water parks, in terms of attendance, in Europe in 2020. Germany is among the top countries with the most popular water parks. In 2020, Therme erding was the most visited water park in Europe (**0.75 million attendants**).

WATER PARKS	COUNTRY	2020	2019	CHANGE
Therme erding	Germany	0,75	1,85	-65%
Aquapalace	Czech republic	0,54	1,3	-59%
Tropical Islands	Germany	0,49	1,23	-51%
Siam Park	Spain	0,1	1,2	-54%
Aqualand Moravia	Czech republic	0,37	0,8	-92%
Tiki Pool	the Netherlands	0,39	0,8	-60%
Nettebad	Germany	0,31	0,75	-58%
Lalandia	Denmark	0,24	0,68	-59%

Attendance in Million

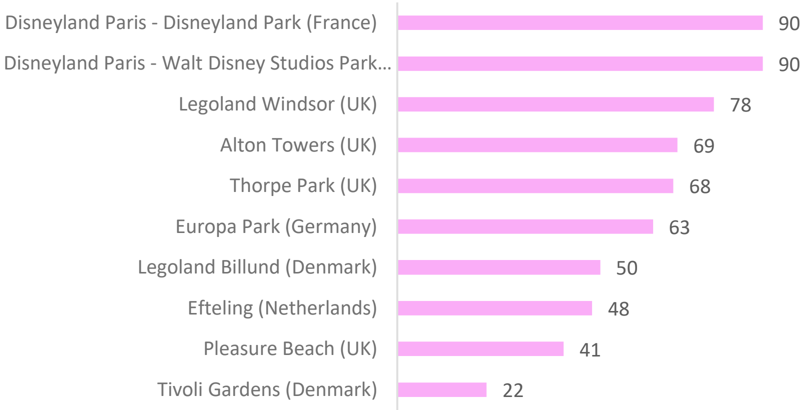
European leisure market – Amusement Parks & Water Parks ticket prices

In Europe, the most expensive parks in terms of price per ticket are DisneyLand Paris-Disneyland Park and DisneyLand Paris-Walt Disney Studios, both located in France and with an entrance price of **€ 90**.

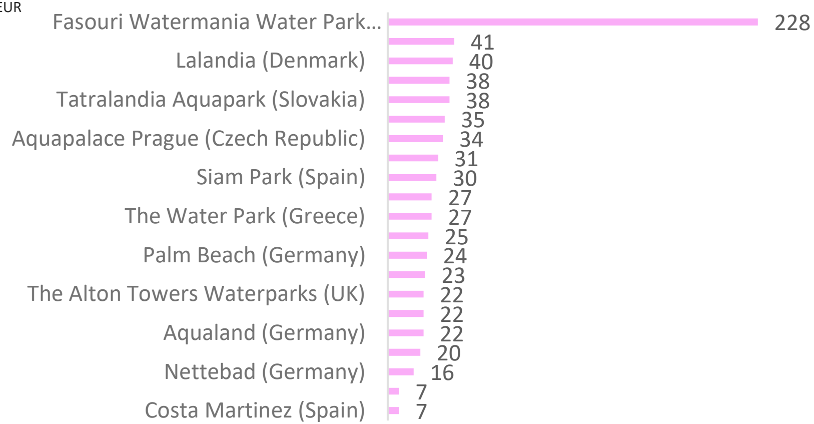
The cheapest amusement park in Europe is Tivoli Gardens (in Denmark) with a price of **€ 22 / ticket**.

In the case of water parks, the most expensive park (within the countries analyzed) is Lalandia, in Denmark, with a price of **€ 41** and the cheapest Costa Martinez, located in Spain and with a price of **€ 7**.

Ticket prices of leading Amusement Parks
2022
EUR



Ticket prices of selected Water Parks
2022
EUR



Funded by the European Union

Spain

Global share of subscribers to popular streaming services

Traditional TV and Home Video revenue

Revenue of leading Amusement Parks

Funded by the European Union

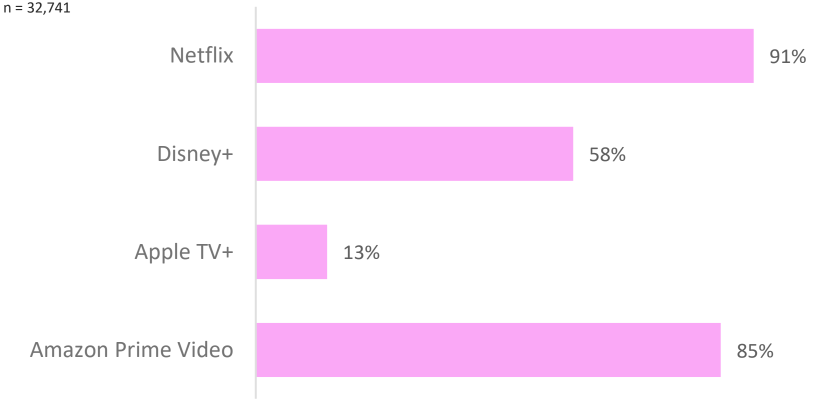
Spanish entertainment market – Streaming services and traditional TV

Netflix had the greatest share of subscribers among SVOD platforms in Spain in 2021, with **91 percent of users subscribing** to the Spanish Netflix subscription streaming service. Apple TV+ was the least popular streaming platform in the country.

On the right side it can be seen that the segment that brings more income to the audiovisual sector (TV) in Spain is Traditional TV Advertising (**€1,89 million** in 2021) and the one that brings the least amount of income to the sector is Physical Home Video (**€0,08 billion** in 2021).

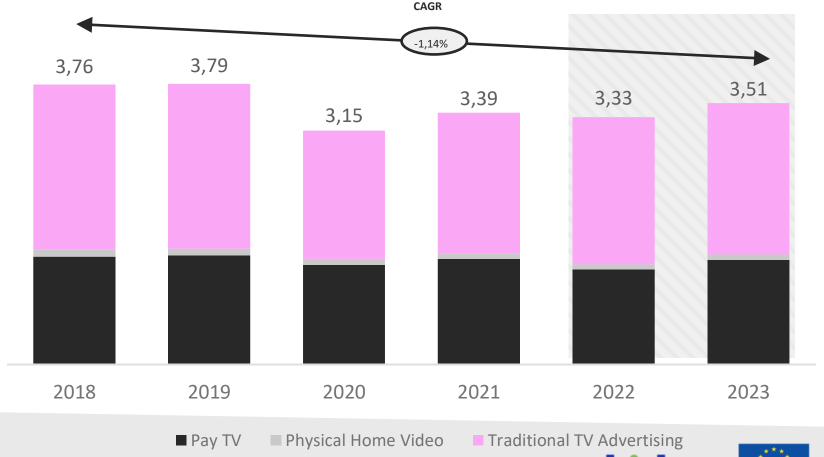
Global share of subscribers to popular streaming services

2021
In %
n = 32,741



Traditional TV and Home Video revenue

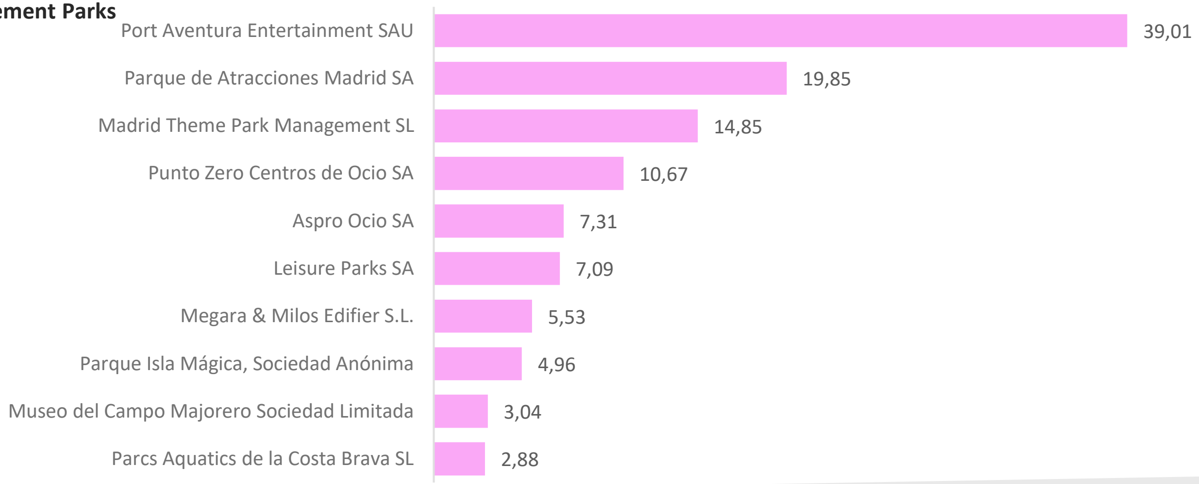
2018 - 2023
In billion EUR



Spanish entertainment market – Amusement Parks

In Spain, the amusement park that generated a higher level of income in 2020 was PortAventura Entertainment SAU, with **€39.01 million**. On the other hand, the park with the lowest level of income generated in 2020 was the Parcs Aquatics de la Costa Brava SL, with **€2.88 million**.

Revenue of leading Amusement Parks
2020
MEUR
by sales revenue



Funded by the European Union

France

Traditional TV and Home Video revenue

Number of hours spent per week looking at a screen by children and teenagers

Breakdown of cinema attendance

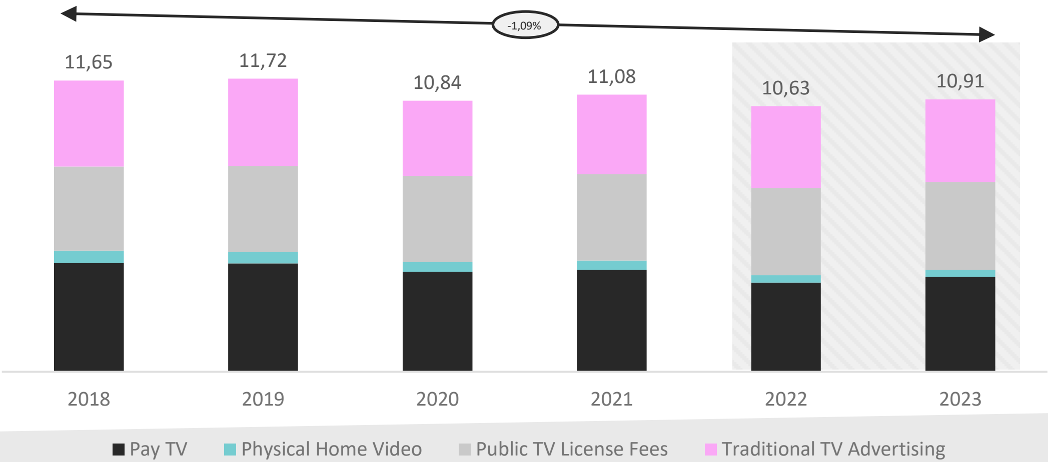
Distribution of film spectators in cinemas

Funded by the European Union

French entertainment market – Traditional TV and Home Video

The segment that brings more income to the audiovisual sector (TV) in France is Pay Tv (with €4,08 billion in 2021) and the one with the least Physical Home Video (with €3,45 billion in 2021). Total revenue generated by the French Traditional TV and Home Video Revenue television has decreased by **1.09 year-over-year** since 2018 and is expected to run through 2023.

Traditional TV and Home Video revenue
2022
In billion EUR

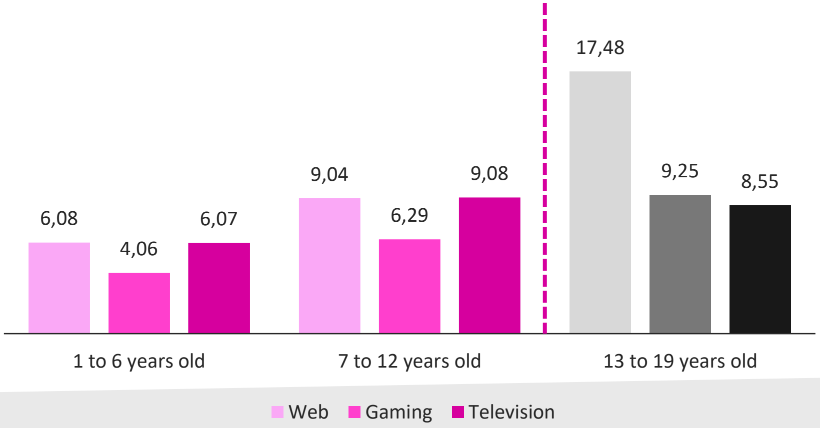


French entertainment market – Consumer behaviour

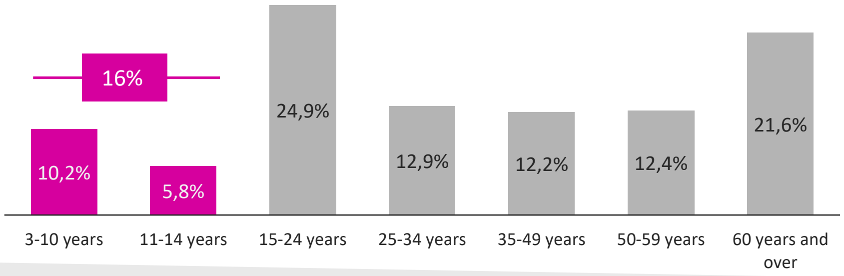
By march 2022, French children aged six and younger spent on average six hours watching television and six hours on the internet per week, while the gaming screen time slightly surpassed four hours.

In the case of the graph on the right, this represents the breakdown by age group of French cinema attendants in July 2021, where 16 percent of attendants were aged **3-14 years old**.

Number of hours spent per week looking at a screen by children and teenagers
2022
in hours.minutes, by media



Breakdown of cinema attendance
July 2021
by age group

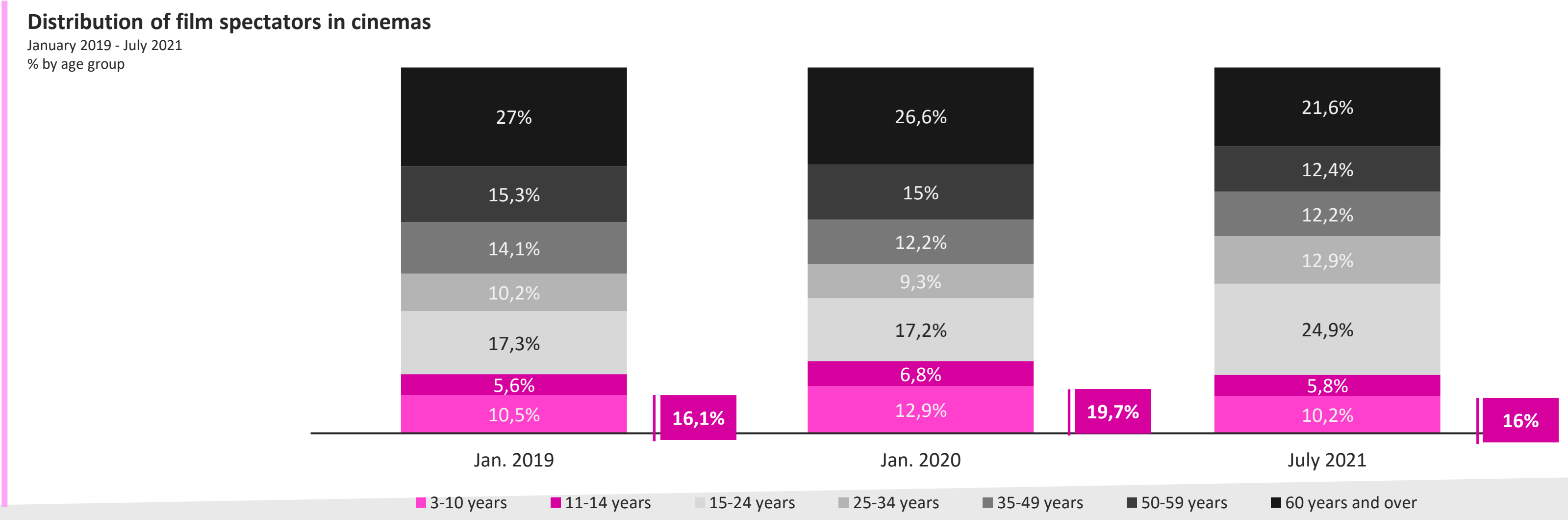


Funded by the European Union

French entertainment market – Consumer Behaviour

If we compare the graph on the previous page with the same graph in different years, it can be seen that the audience from 3 to 14 years old remains the group that most attends the cinema to see movies, with **16.1%.**

Even so, from 2020 to 2021 consumption decreased by almost **3%**, perhaps partly due to the economic crisis that dragged the COVID-19 pandemic.



Italy

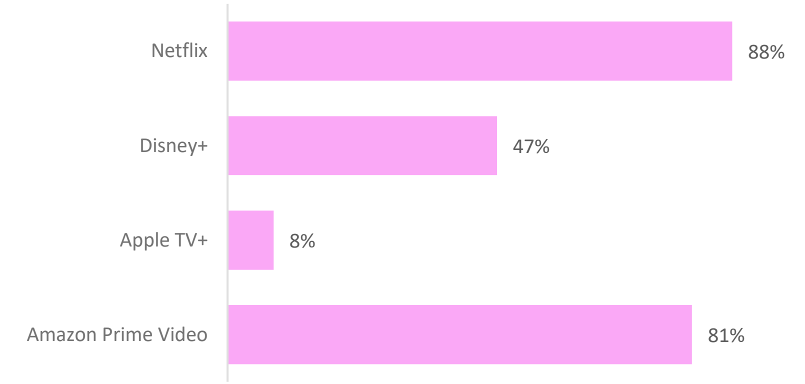
Italian entertainment market – Streaming services and Traditional TV

In Italy, Netflix had the greatest share of subscribers among SVOD platforms in Italy in 2021, with **88 percent of users subscribing** to the Italian Netflix subscription streaming service. Apple TV+ was the least popular platform in the country with just an **8% share**.

On the right side it can be seen that the segment that brings more income to the Traditional TV and Home Video Revenue in Italy is **Pay TV (€3,88 million)** and the one with the least revenue generated **Physical Home Video (€2,24 billion).**

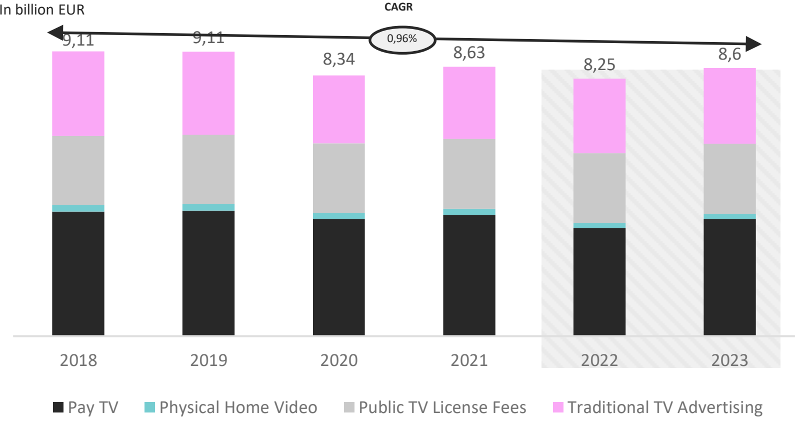
Share of subscribers to popular streaming services

2021
In %



Traditional TV and Home Video revenue

2018 -2023
In billion EUR

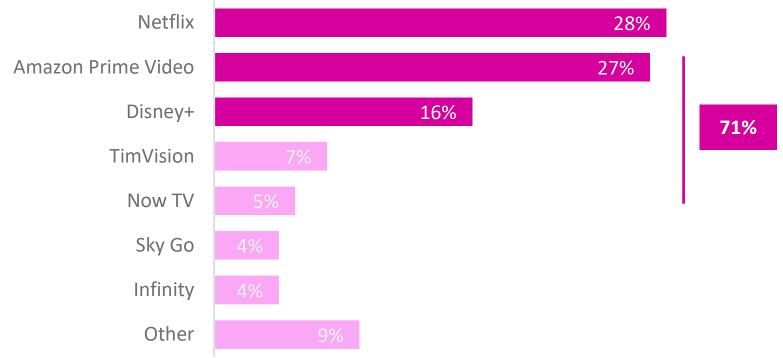


Italian entertainment market – Streaming Platforms and TV

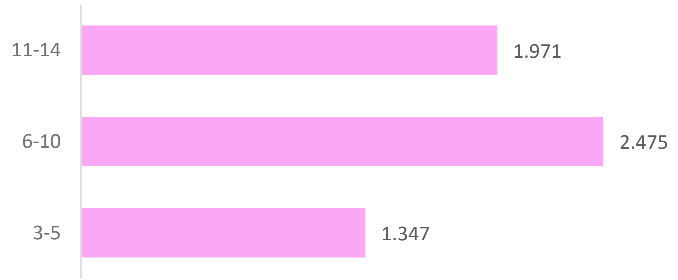
The platform with the largest market share in the sector in Italy is Netflix, although it surpasses Amazon Prime Video by only 1%. The streaming platforms with the lowest market share are Sky Go and Infinity, both with **4%.** The three streaming platforms with the highest market share (Netflix, Amazon Prime Video and Disney +) collect **71% of the market share of the sector**.

The graph on the right shows that the number of children in the age range of 3 to 5 years who watch TV is **1,347 million**, those from 6 to 10 years who do so **2,475 million** and those from 11 to 14 years **1,971 million**. In this way, the range of children's age that most tends to watch television is **that of 6 to 10 years**.

Platforms by market share
2021
&



Number of individuals watching TV
2021
By age, in 1,000s

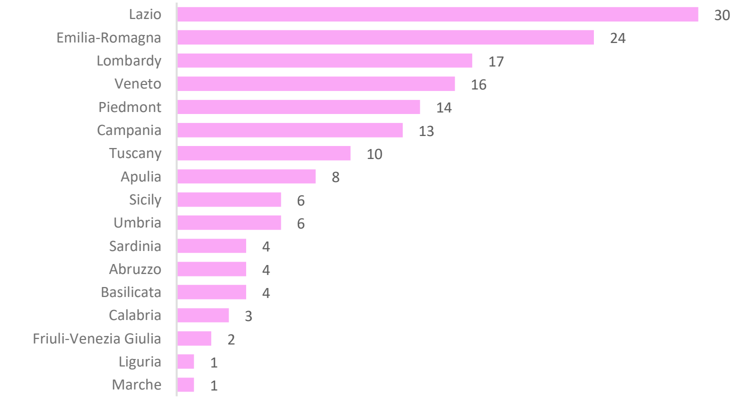


Italian entertainment market – Amusement Parks

In Italy, the geographical area with the most amusement parks are **Lazio (30 parks)** and **Emilia-Romagna (24 parks).** As we can see, in the case of Lazio, this is the third area of Italy in the ranking of revenues generated from its amusement parks (**€ 32,024 in 2019**) while Emilia-Romagna remains the second region in the ranking of revenues generated in 2019 (**€77,395).**

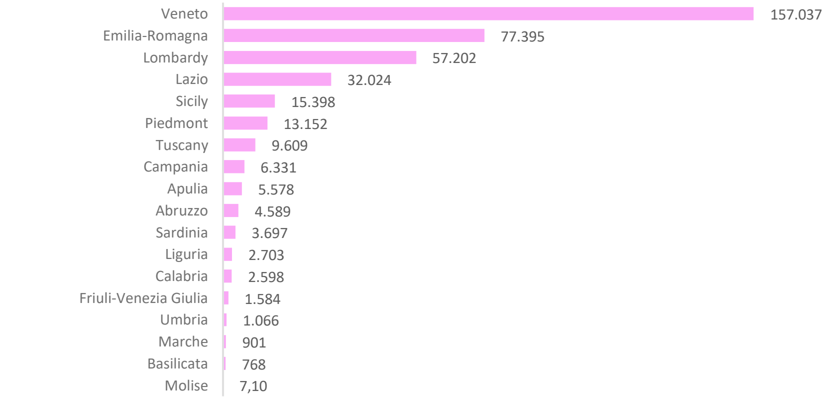
Amusement Parks by regions

2021
by región
In units



Revenue of Amusement Parks by region

2019
by región
In TEUR (1.000)



Italian entertainment market – Amusement Parks

In Italy, total revenue generated by amusement parks reached **€391,642** in 2019, a total higher than in 2018, when €380,272 was generated.

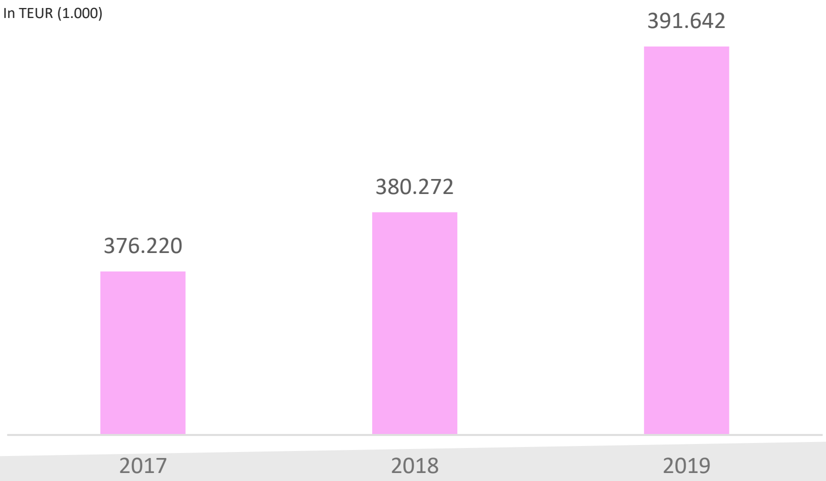
Speaking of the price of the admission ticket to the parks, the average admission fee in 2019 was **€13.64**, higher than the one in 2018. Taking into account the information mentioned above, it can be interpreted that in 2019 more tickets were sold, although for a cheaper price.

In 2020 the price of admission to the amusement parks continued to decrease, positioning itself **at € 13 / ticket**.

Amusement Parks' national revenue

2017-2019

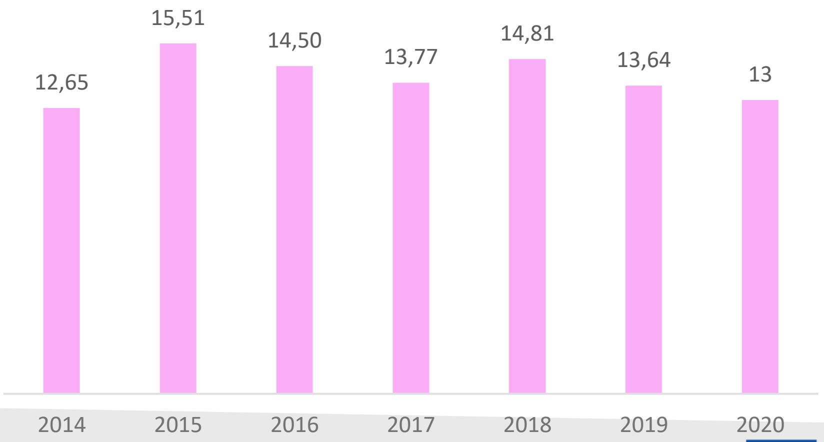
In TEUR (1.000)



Amusement Parks' national average admission fee

2014-2020

EUR



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Denmark

Traditional TV and Home Video revenue

Weekly reach of selected video streaming services

Share of children spending at least four hours on social media daily on a weekday

Top visited Amusement Parks

Danish entertainment market – Traditional TV and Streaming Services

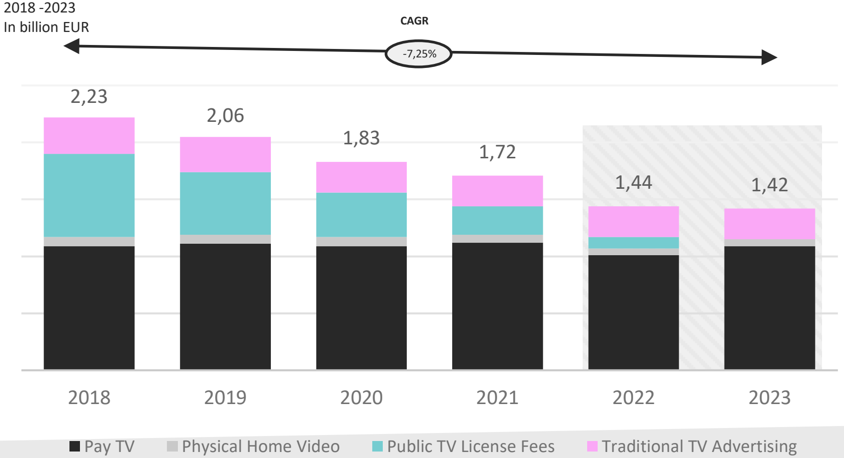
The segment that brings more income to the Traditional TV and Home Video Revenue in Denmark is, as majority in all countries, is he Pay TV while the least valued one is the Phyisical Home Video.

YouTube is the highest-reached streaming platform in Denmark, at **54 percent** on a weekly basis in 2021. In a second place came the online television service of Denmark's public service broadcaster DR TV with a weekly reach of **53 percent**, followed by SVOD platform Netflix.

Traditional TV and Home Video revenue

2018 -2023

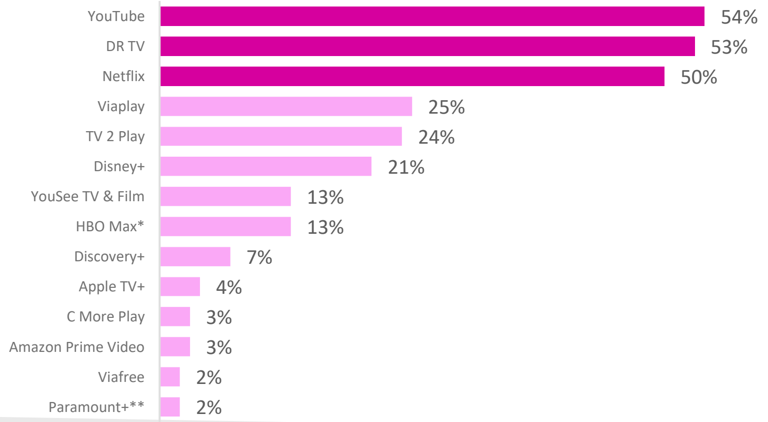
In billion EUR



Weekly reach of selected video streaming services

2021

In %

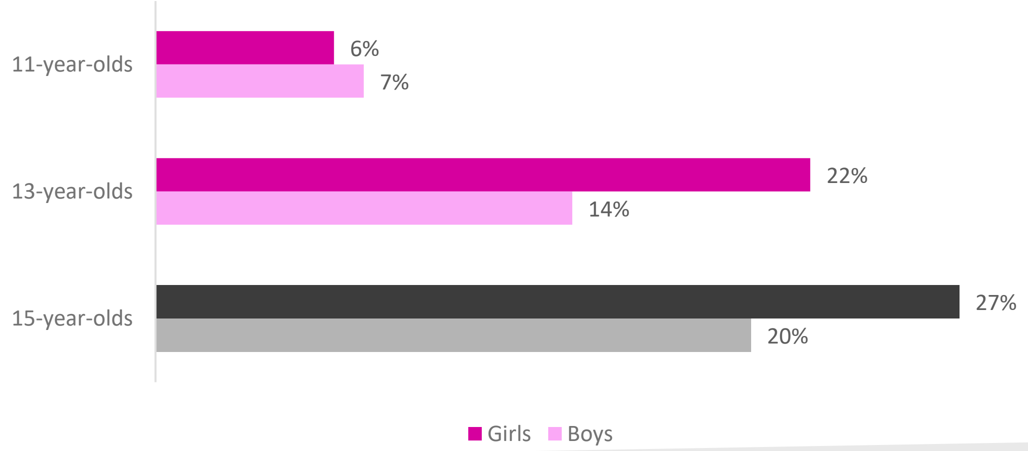


Danish entertainment market – Consumer behaviour

In 2018, the amount of time children spent on social media in Denmark was increasing with the age of the respondents. While seven percent of 11-year-old boys were using social media at least four hours a day on a weekday, this was the case for **20 percent of the 15-year-olds**. However, teenage girls spent even more time communicating on social media than their peers. While only **six percent of the 11-year-old girls** were on social media four hours a day, **22 percent of the 13-year-olds** did the same.

The most active group on social media during the week were 15-year-old girls, where **27 percent** used a minimum of four hours every day.

Share of children spending at least four hours on social media daily on a weekday
2018
by age and gender

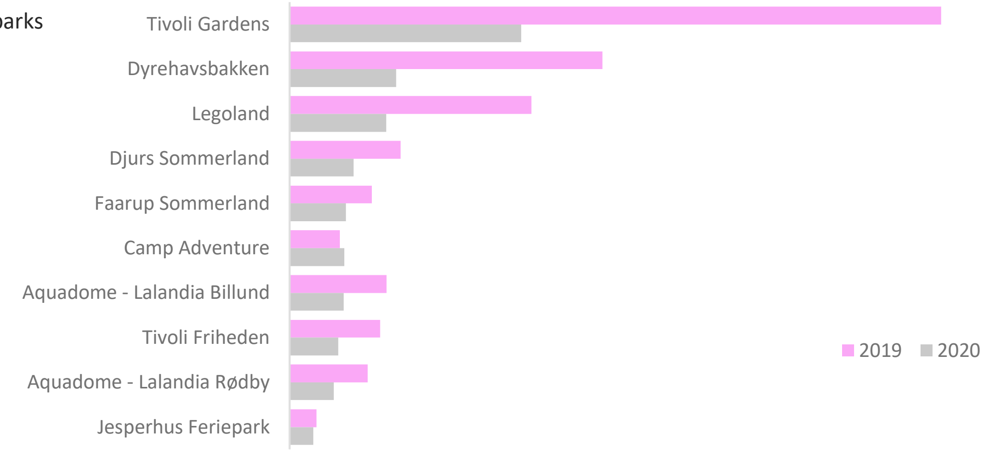


Danish leisure market – Water Parks

In Denmark, the most visited amusement park in 2020 was "Tivoli Gardens", with **1,628 visitors**. In the previous year, this was also the most visited amusement park, although with a much higher number of visits **(4,581)**.

In second place is Dyrehavsbakken, with **2,200,000 visitors** in 2019 and **750,000 visitors** in 2020.

Top visited Amusement Parks
Leading amusement and water parks
2019 - 2020
by number of visitors (in 1,000s)



Germany

Global share of subscribers to popular streaming services

Traditional TV and Home Video revenue

Audience market share of children's TV channels

Industry revenue of activities of Amusement Parks

Number of Amusement Parks visits

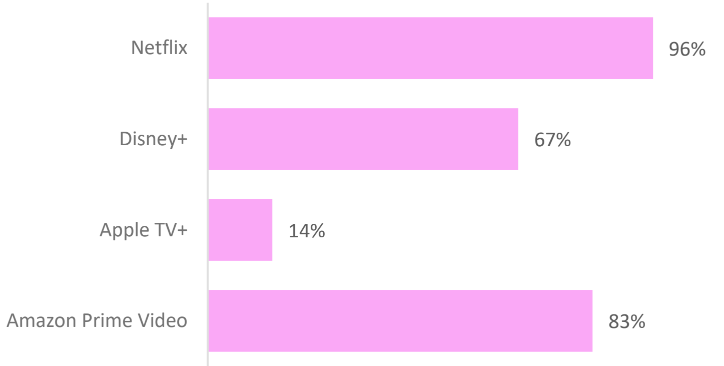
Number of people visiting Amusement Parks by frequency

German entertainment market – Streaming Services and Traditional TV

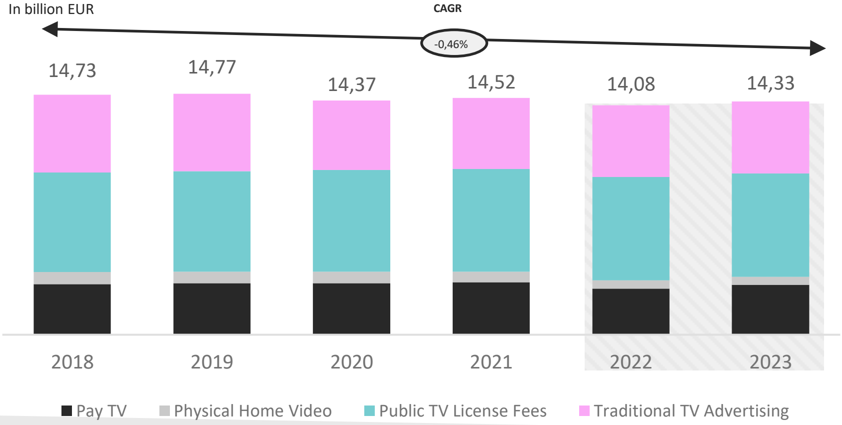
In Germany, Netflix had the greatest share of subscribers among SVOD platforms in Germany in 2021, with **96 percent** of users subscribing to the Italian Netflix subscription streaming service. Apple TV+ was the least popular platform in the country with just an **14% share**.

The segment that brings more income to the Traditional TV and Home Video sector in Germany is the **Public TV License Fees (with €6,32 billion)** , while the least valued one is the **Phyisical Home Video (€0,64 billion)**.

Global share of subscribers to popular streaming services
2021
%



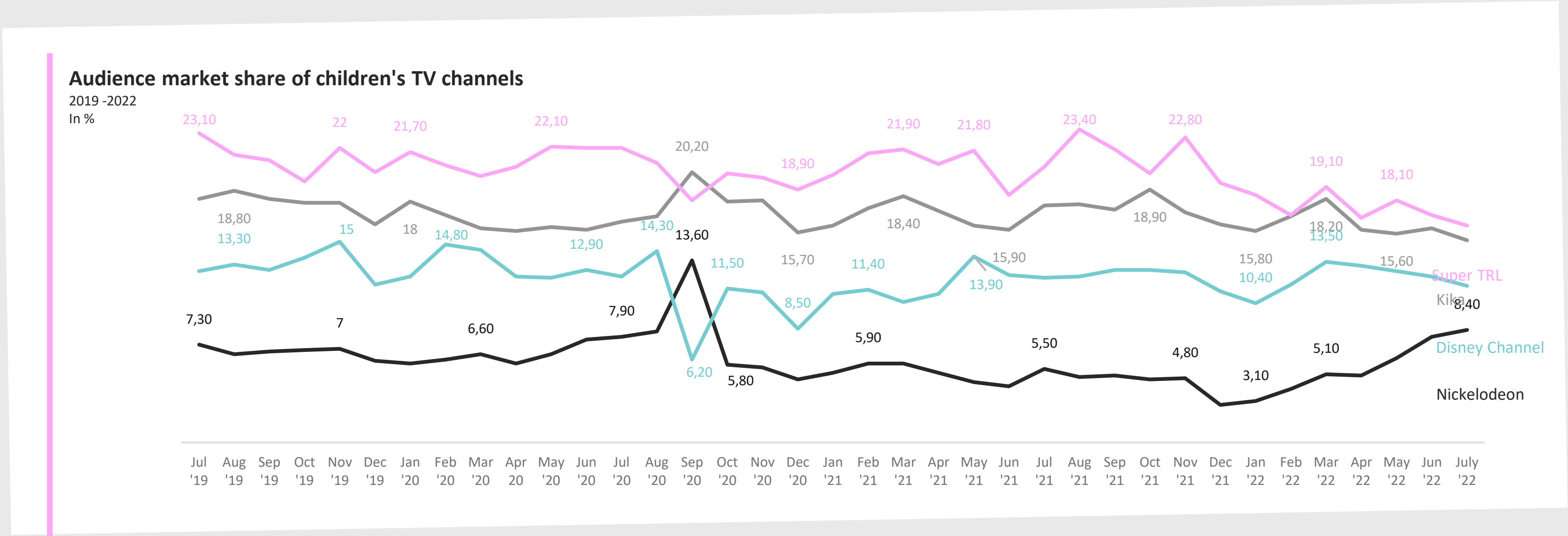
Traditional TV and Home Video revenue
2018 - 2023
In billion EUR



German entertainment market – Children’s TV channels

As it can be seen from the chart, there are 4 main children's channels in Germany. In July 2022 the channel with the highest market share was "Super RTL" while the channel with the lowest market share was "Nickelodeon".

In general, during all the years this trend has remained like this: although with variable market shares, the most watched channel is Super Rlt and the least watched Nickelodeon.



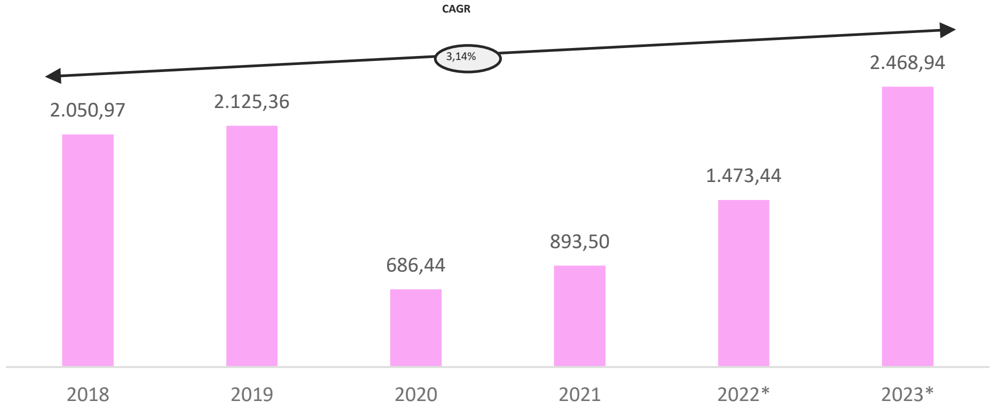
German entertainment market – Amusement parks

In Germany, amusement parks billed a total of **€893.50 million** in 2021. Revenues are expected to rise to **€1,473.44 million** in 2022 and are expected to rise by 2023 at an annual growth rate (**CAGR**) of **3.14%** from 2018 to 2023.

Industry revenue of activities of Amusement Parks

2012 -2025

MEUR



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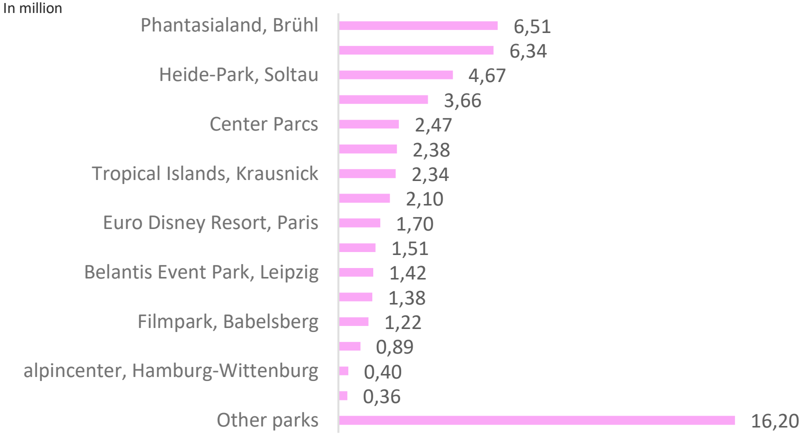
German leisure market – Amusement Parks

In Germany, the most visited amusement park in 2019 was Phantasialand, Brühl with a total of **6.51 million of attendants**.

The trend of attendance in temporary attraction parks in 2020 was low, since in 2020 **38.47 million people** claimed that they never visit amusement parks and only **1.78 million people** claim to often attend this type of leisure spaces.

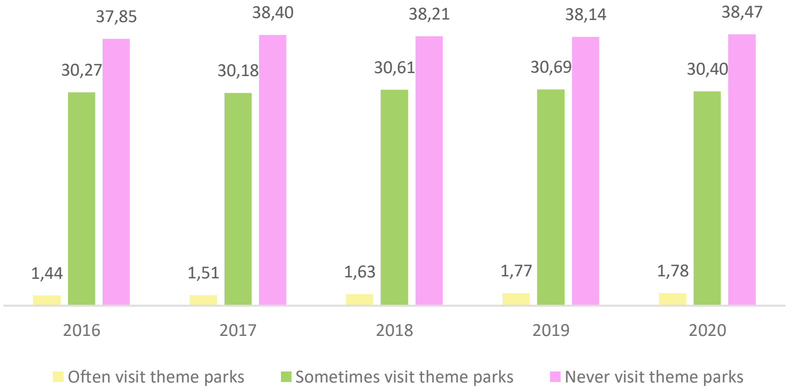
Number of Amusement Parks visits

2019
In million



Number of people visiting Amusement Parks by frequency

2016-2020



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Poland

Share of subscribers to popular streaming services

Traditional TV and Home Video revenue

Ranking of children's TV channels by audience share

Cost of a standard admission ticket to Amusement Parks

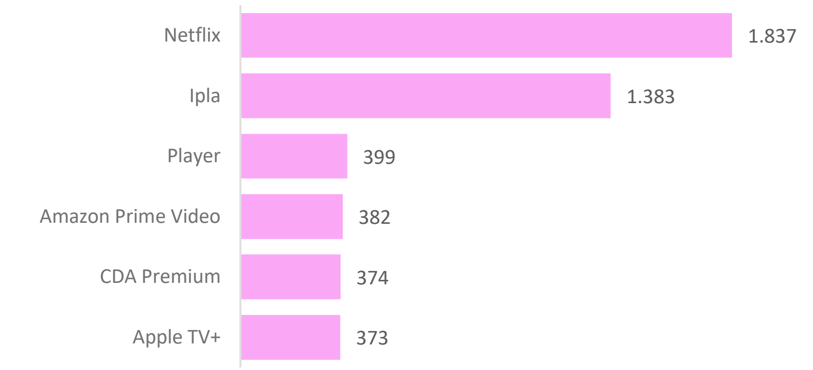
Funded by the European Union

Polish entertainment market – Streaming Services & Traditional TV

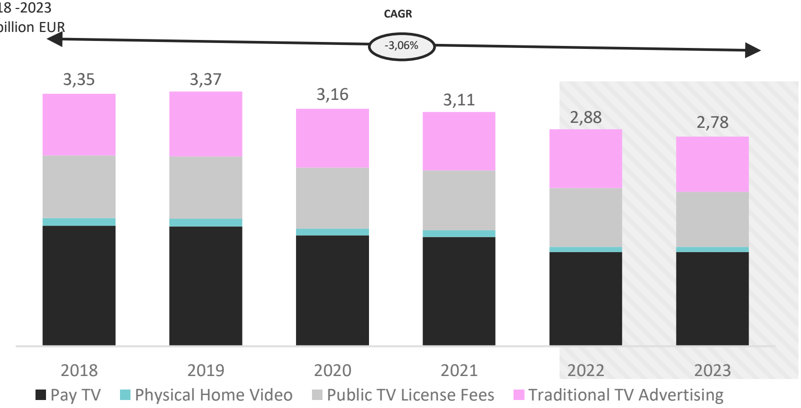
In Poland, Netflix had the greatest share of subscribers among SVOD platforms in 2021, with **1.837 million of users subscribing** to the Italian Netflix subscription streaming service. Apple TV+ was the least popular platform in the country with just 373.000 subscribers.

In the Polish Traditional TV and Home Video sector, the segment that generates the most revenue is "Pay Tv", which in 2021 generated **€1.45 billion**. "Physical Home Video" is the segment that contributes the least money in the sector, and in 2021 it generated a total of **€0.79 billion**.

Share of subscribers to popular streaming services
2021
by provider (in 1,000s)



Traditional TV and Home Video revenue
2018 -2023
In billion EUR

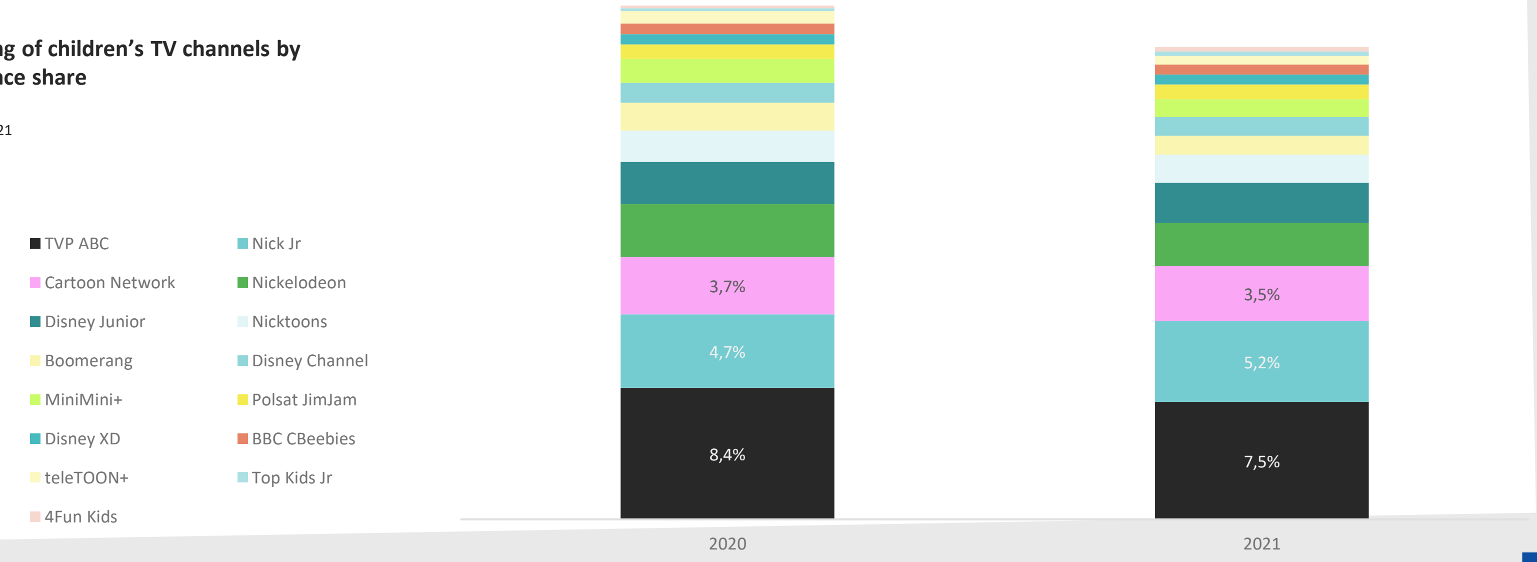


Polish Entertainment market – Children’s TV channels

TVP ABC was the leading children's TV channel in Poland in 2021, with a **7.5 percent audience share** among children aged between 4 and 12 years old. Nick Jr and Cartoon Network followed, with a **5.2** and **3.5 percent** audience share, respectively.

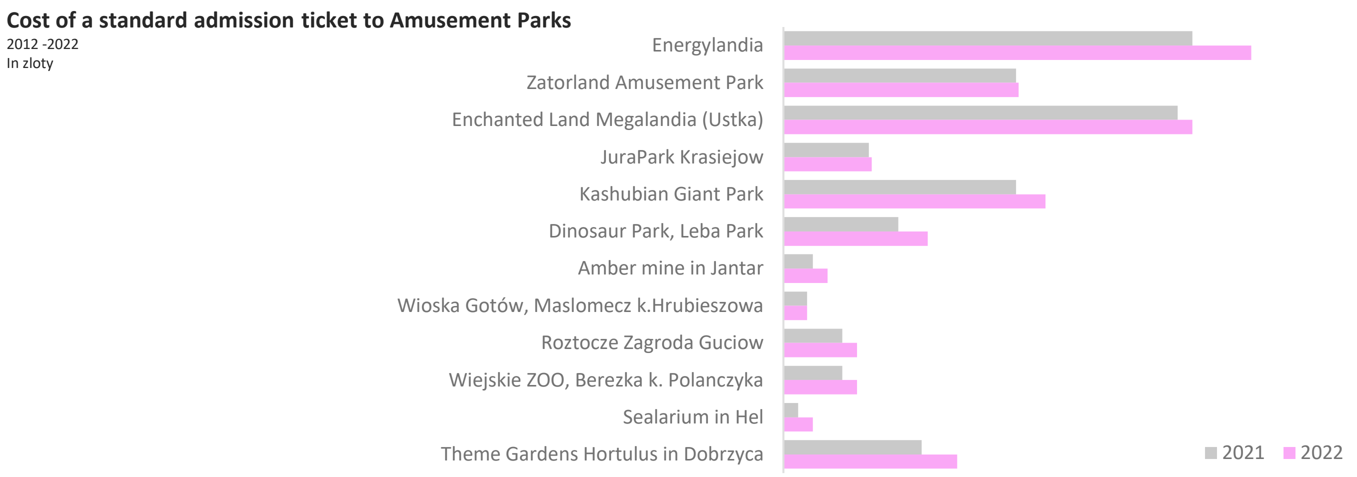
Ranking of children’s TV channels by audience share

2020 - 2021
%



Polish Entertainment market – Amusement parks

In 2021, the standard admission ticket of the most expensive amusement park in Poland (Energylandia) had an average ticket of **€ 159** and the cheapest amusement park (Sealarium in-Hel) had an average ticket of **€ 10.**



Slovakia

Traditional TV and Home Video revenue

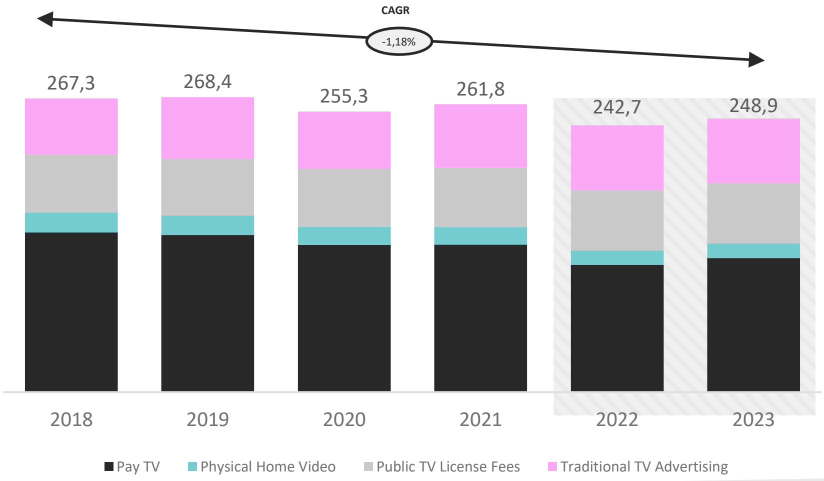
Slovak Entertainment market – Traditional TV and Home Video

En Slovakia, the segment that brings more income to the generic TV sector is the Pay TV, contributing in a total of **€134.3 billion** to the sector in 2021.

On the other heand, the least valued one is the Phyisical Home Video, which in 2021 billed only **€15.82 billion**.

Traditional TV and Home Video revenue

2018 -2023
MEUR



2.2.5. Education & Publishing

Books and magazines specifically created for children. It is presented in the form of short stories or novels, poems and plays. Children's and young people's books are intended for leisure and education.

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2.2.5. Education & Publishing

Key findings

The **publishing industry seems to be growing in most European markets, and especially those categories aimed at children**, as we can gather from several recent studies in different countries

- Publishing revenues in France grew 3,6% CAGR 2018-2021, with very significant growth (12%) in 2021 compared to the previous year, reaching beyond pre-pandemic levels. In Germany and Denmark, growth is less significant, with a 1% CAGR (2018-2023) and a 0,75% CAGR (2017-2020), respectively. The market is decreasing in Poland with -2,1% CAGR from 2018 to 2023

- In Germany, **children's and young adult's books represent 19% revenue share of the publishing market**, just behind fiction books (32%). In the **French market, the youth segment is 14% revenue and 20% volume of the publishing market**, the largest categories behind religious and esoteric books and comics and manga, while school books represent 11%. Figures are similar for Denmark: in 2020, children's books represented 14% of the publishing market's revenue.

- The children's and youth category within the publishing industry also seems to be growing **in Spain, revenue for the category grew by almost 3% CAGR** from 2017 to 2019, and book prices grew 2,25% CAGR 2010-2017. **In Italy, the number of children's books published grew by 6,3% CAGR** 2016-2019. However, a similar analysis for the Danish market shows that the number of books published in the country decreased by -7% CAGR in almost the same period (2017-2020).

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2.2.5. Education & Publishing

Purchasing & reading habits

Books seem to still be purchased mainly in specialised physical stores and despite competition from screens, reading is still a relatively common habit for many European children:

- A Danish 2021 study shows that **over half of book purchases (54%) are still done in bookstores, and 12% in other general retail stores**. Only 18% where online purchases. Another 2019 study reflects that literature for youth and children represents 19% of sales in bookstores compared to only 11% of sales online.
- A German 2020 study among teenagers shows that **38% of 12- to 13-year-olds read at least several times a week**, and 26% read at least once every two weeks.
- **Top publishers and top selling authors and books are generally very different from market to market,** with many local brands and writers leading in each country and a few well-known authors and books in translation that become popular across several markets.

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Spain

Number of edited children and young people e-books

Revenue from children and young people book sales

Average Price of children books

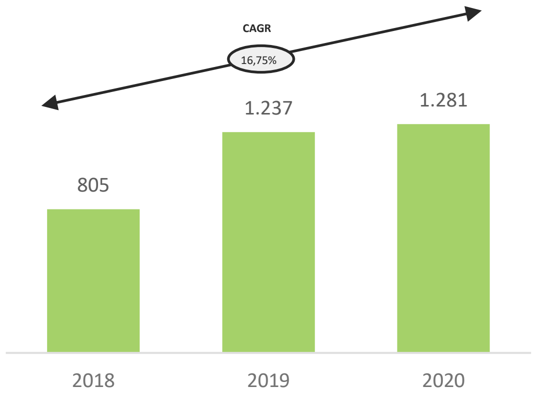
Spanish publishing market – Children and Young people books

The number of publications of children's and Young people's e-books in Spain grows from year to year with a growth rate of **16.75%** and in 2020 a total of **1,281 books** considered in this category were published.

The revenues generated by the sale of children's and young people's books in 2019 were **€312,20 million**, a considerable amount in proportion to the revenues of 2017, which were **€286.20 mill**ion.

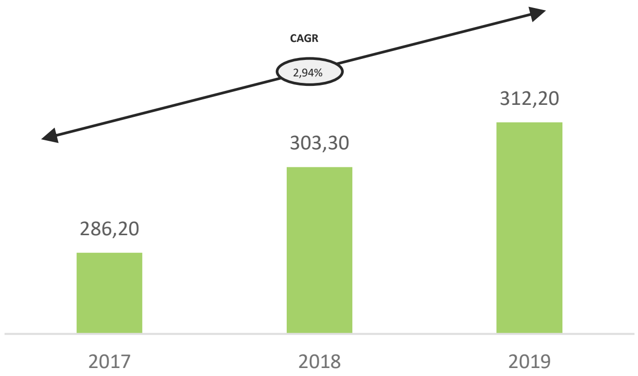
Number of edited children's and young people e-books

2018 - 2020
Number of books



Revenue from children and young people book sales

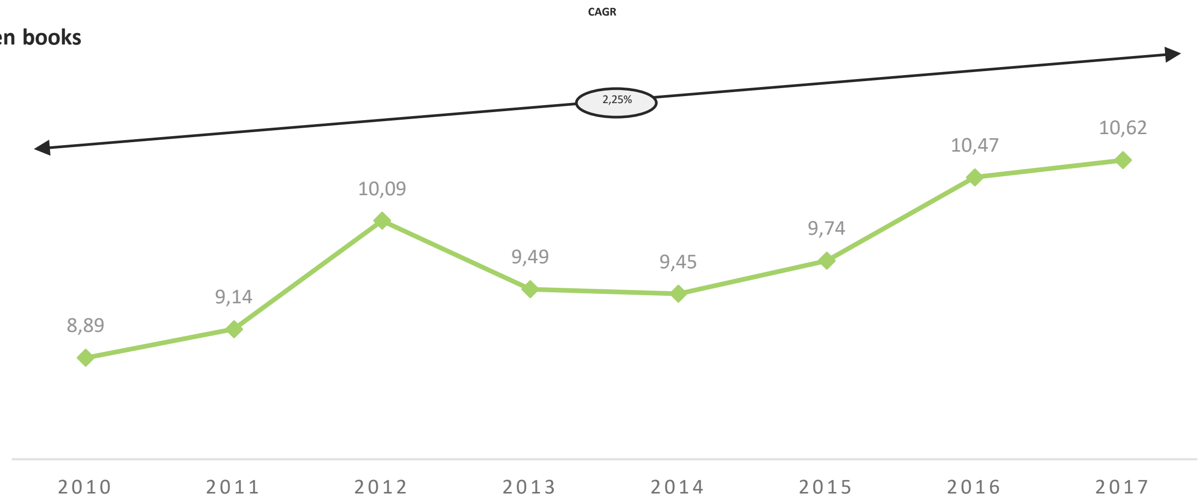
2017 - 2019
MEUR



Spanish publishing market – Children books

The average price of children's books in Spain grew from 2010 to 2017 by 2.25% (CAGR) positioning itself in the last year at **€ 10.62 / the book**. If this price is compared with that of 2010, the book has increased its price by **€ 1.73**.

Average price of children books
2010 - 2017
EUR



France

Book publishing revenue

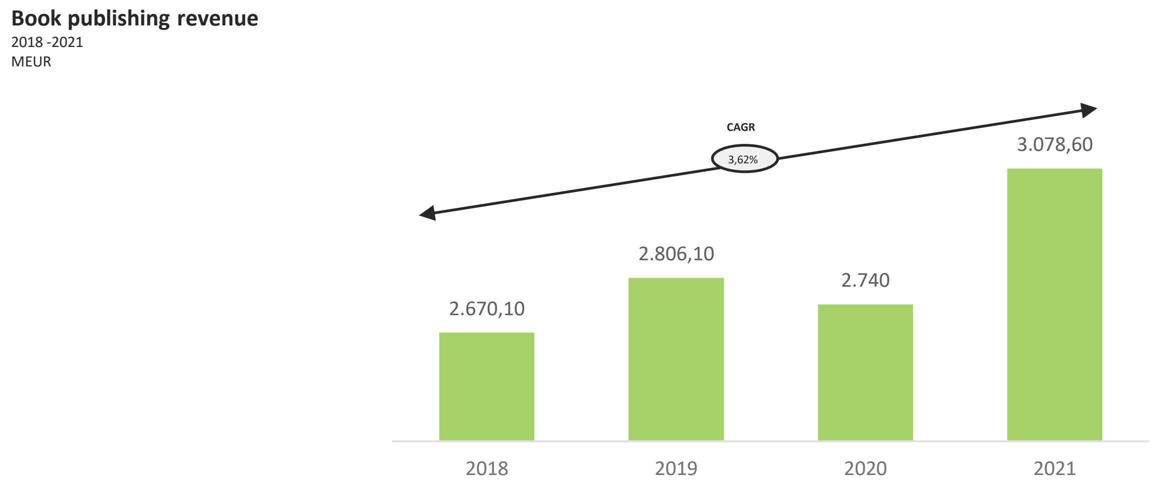
Book publishing revenue by genre

Book publishing sales volume distribution

French publishing market – Book industry

In France, the total revenue generated by the publishing sector (which includes children's books and all other genres) billed in 2021 a total of **€3,078.60 million**, **12.35%** more than in 2020.

It is expected that for 2023 and from 2018, year-over-year growth (**CAG**R) will be **3.62%**.

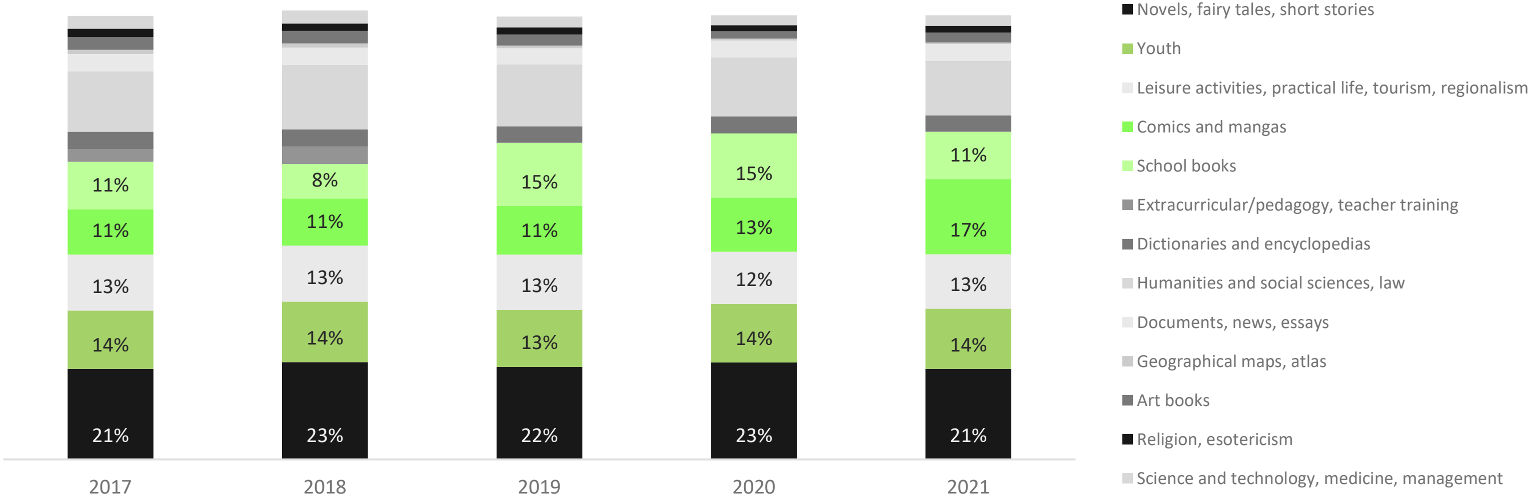


French publishing market – Book industry

Of the total income generated in the sector, in 2021, **14%** was generated from the sale of books for young people and adolescents and **11%** from the sale of school books. While revenue volume has remained stable year-over-year for the youth book segment, the monetary value generated by school books sold has declined.

Book publishing revenue by genre

2017 - 2020



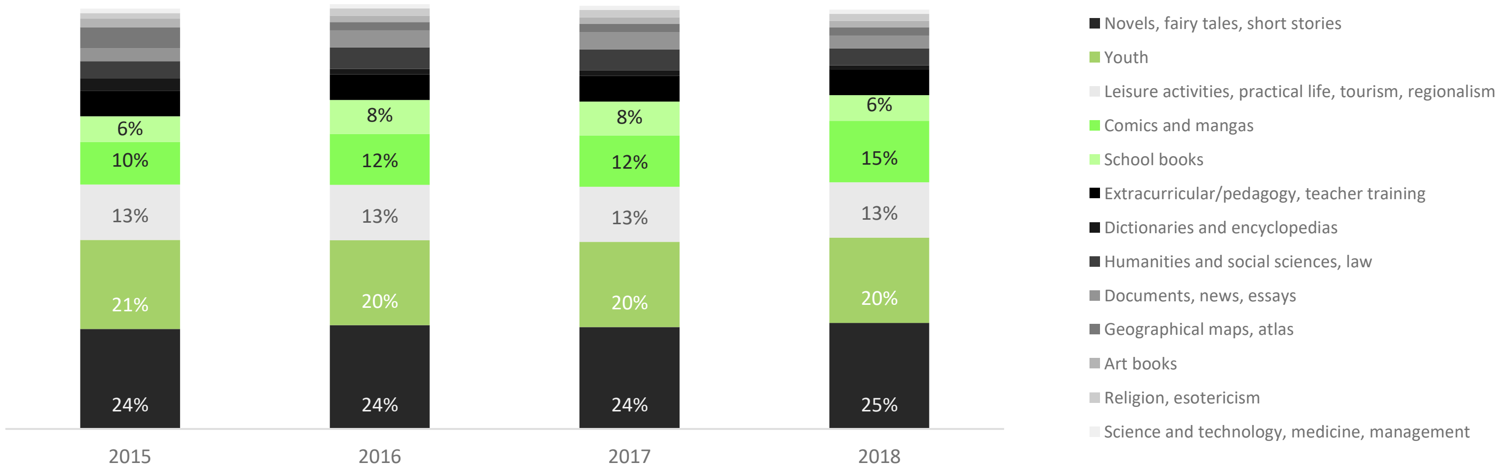
French publishing market – Book industry

Speaking of the volume of book publisher sales volume distributed in France, in 2018 **20% of sales** were of books for young people and **6% of school books.**

These amounts remain practically stable in both segments if we compare it from year to year.

Book publishing sales volume distribution

2015 - 2018



Italy

Revenue of textbooks used in primary schools

Number of children book titles published

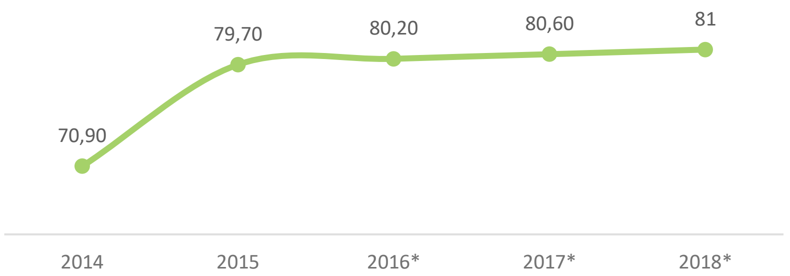
Funded by the European Union

French publishing market – Textbooks and children books

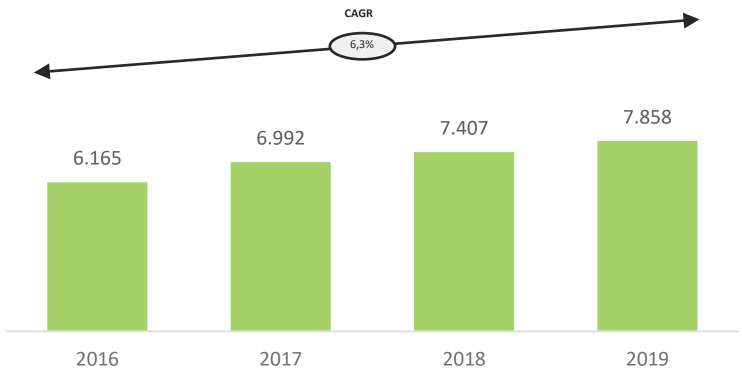
In Italy, according to data from 2014, the income generated by the segment of educational children's books or textbooks for primary education decreased that year, before increasing the following years. In 2018, the total revenue generated by this segment was expected to reach **€81 million**.

If we analyze the number of children's books published in Italy from 2016 to 2019 it can be seen that from one year to the next a growth rate of **6.3% (CAGR)** was identified, reaching, in 2019, the figure of **€ 7,858 million books published**.

Revenue of textbooks used in primary schools
2014 – 2018
MEUR



Number of children book titles published
2016 - 2019
In million units



Denmark

Book purchase channels

Children's books released

Publishing revenue from printed and digital literature

Distribution of book publishing revenue by genre and channel

Distribution of book publishing revenue by genre

Number of employees in the literature and book industry

Danish publishing market – Book industry

. Most of the Danish claim to have bought their last books in a physical bookstore (**54%**) while only 18% did so through online commerce channels.

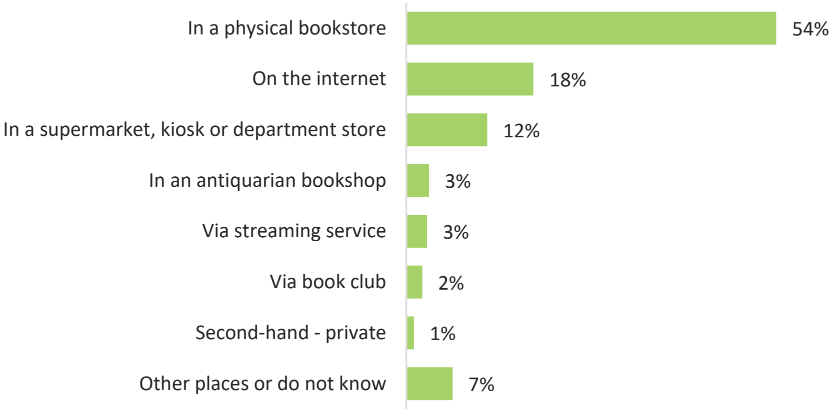
In 2020, **290 new book titles for children were published** in the Scandinavian country, **32 fewer books** than those published in 2019.

Book purchase channels

2021

%

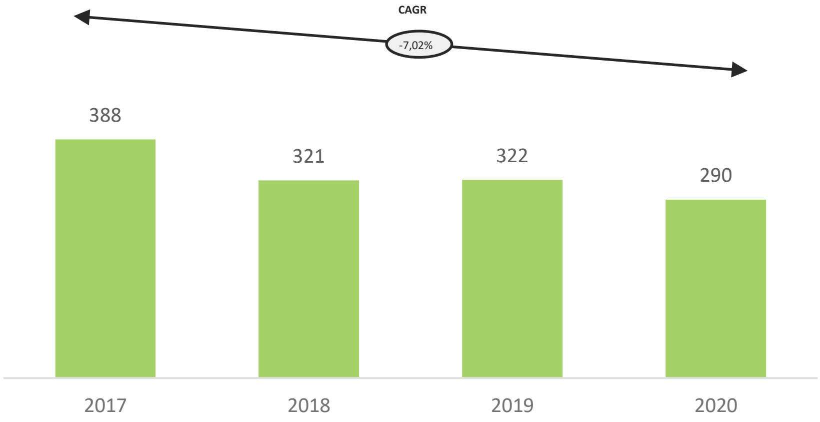
N : 1.200 respondents



Children's books released

2017 - 2020

In units



Danish publishing market – Book industry

While publishers' sales revenue from printed literature declined in recent years in Denmark, the revenue from digital books grew.

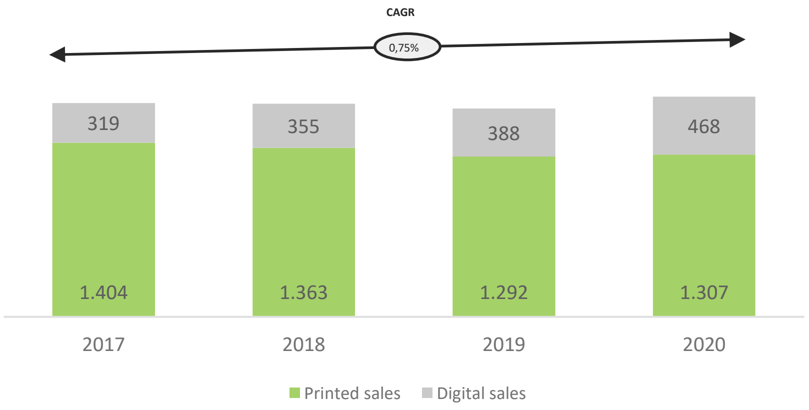
However, publishing companies by far earned more with their printed versions in 2020. The value of printed literature amounted to about 1.3 billion Danish kroner. By comparison, the revenue of digital books, like e-books and audiobooks, was 468 million kroner.

As it can be seen in the graph on the right, in the case of the genre "literature for youth and children" the sales channel where it generates the highest income is in supermarkets and other distributors while directly to private consumers and companies is the channel in which the sector generates less money.

Publishing revenue from printed and digital literature

2017 - 2020

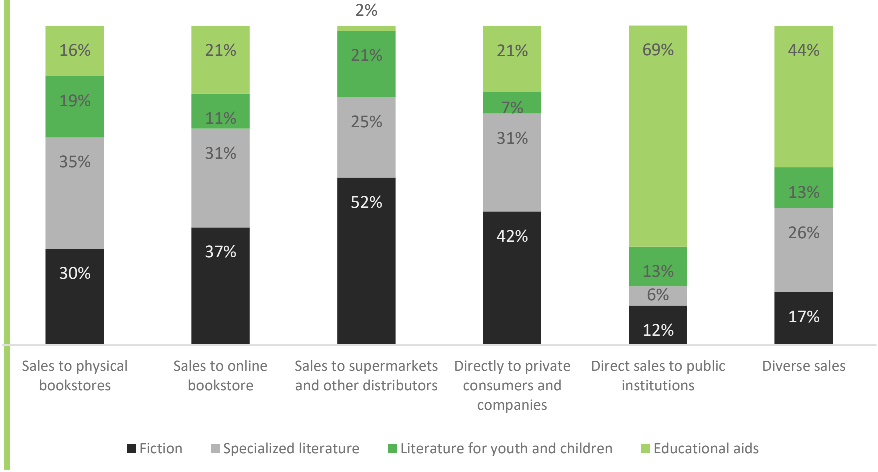
MEUR



Distribution of book publishing revenue by genre and channel

2019

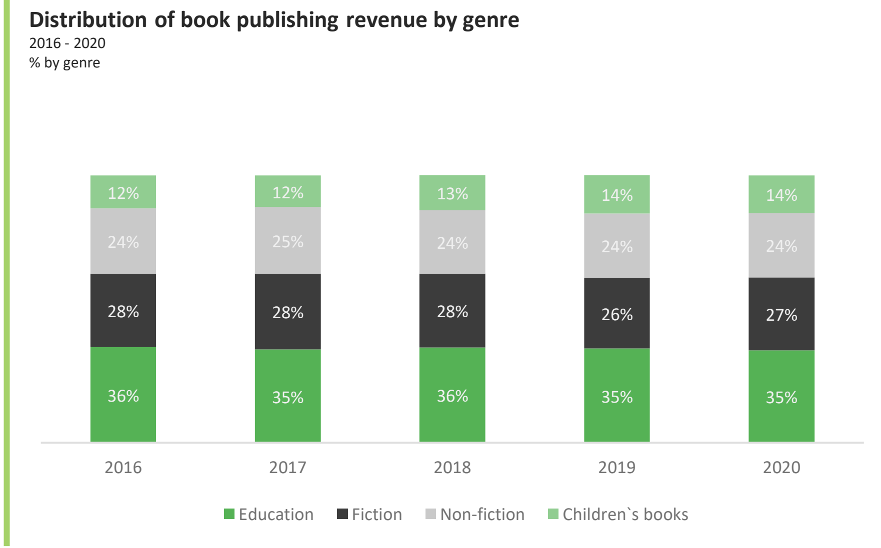
by channel and % by genre

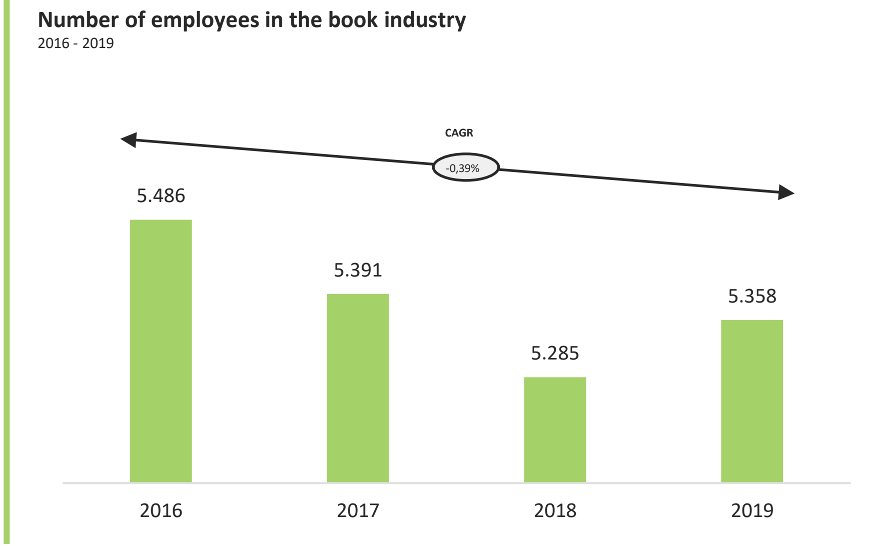


Danish publishing market – Book industry

In Denmark, children's books generated 14% of the total revenue of the sector (according to the categories analyzed in the graph), being the category with the lowest revenue and remaining at a similar percentage from one year to the next. In the case of education books (which include both education books for children and for other ages), it was the category with the highest income (**35%**).

The Danish book industry comprised, in 2019, a total of **5,358 employees**, having experienced -**0.39% annual growth (CAGR)** since 2016.





Germany

Book publishing revenue

Number of new releases of children and young people books

Revenue share of publishers in the children and young people books market

Books market revenue share by genre

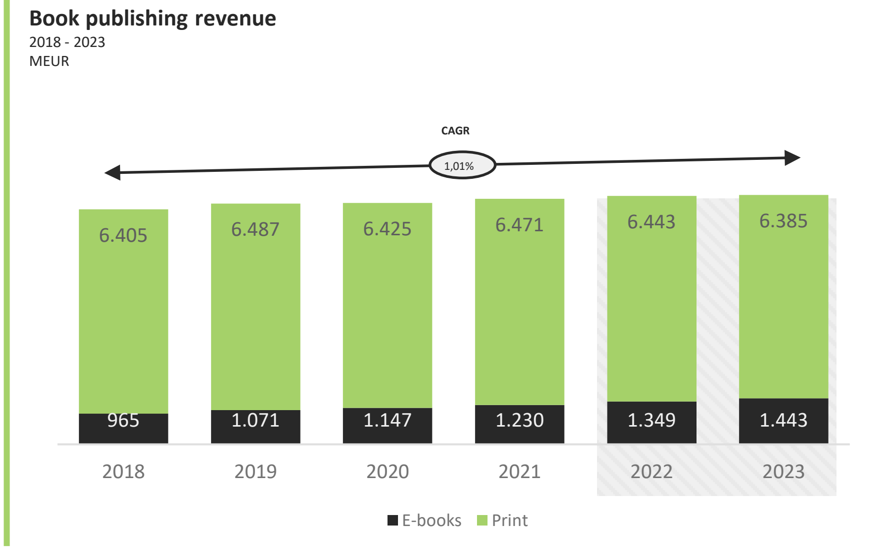
Reach of the most popular children magazines

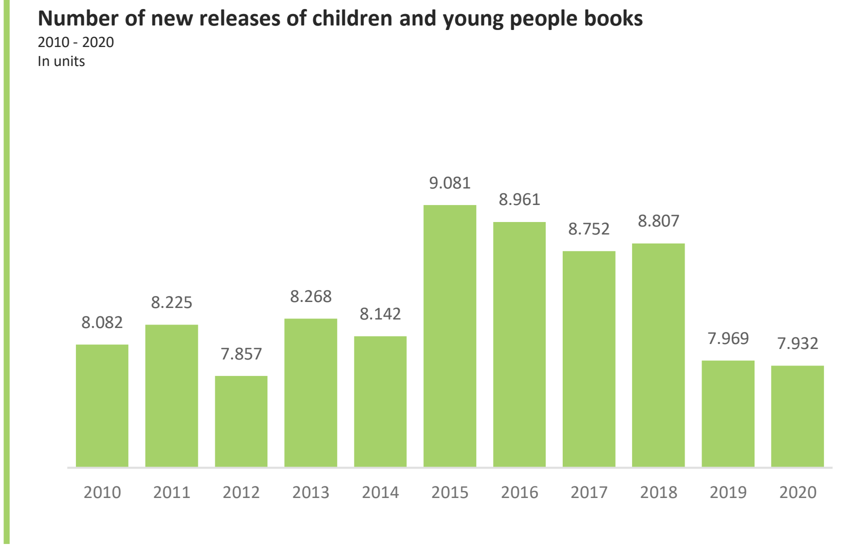
Children books reading frequency

German publishing market – Books industry

In 2020, the German book market generated a revenue of over **6.42 billon euros from print book sales** and **almost 1.15 In billion EURos from e-books**. Revenue for both segments has remained stable during the period of consideration, with e-book revenue even rising in recent years. The German book market lives on.

In 2020, 7,932 new children's and young adult books were released in the German book market. This was a decrease compared to the year before, with **7,969 new releases**. Figures fluctuated somewhat during the observed time period, though they were generally noticeably higher in recent years than in the beginning of the 2000s.





German publishing market – Children’s and Youth books market

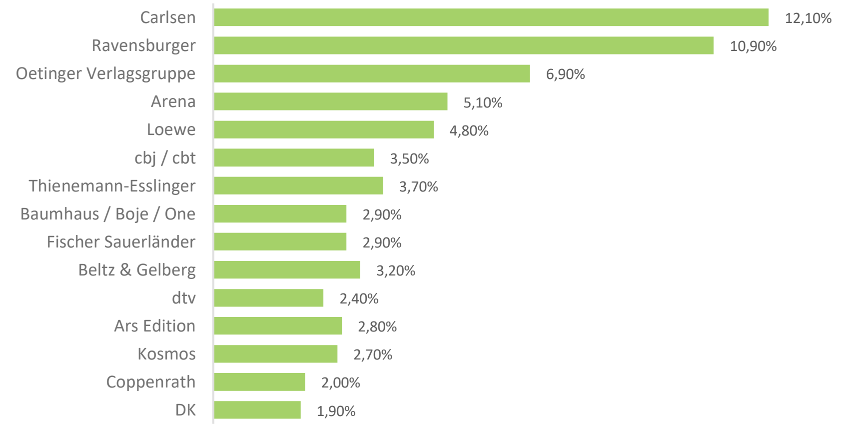
This data depicts the largest children's and young adults' book publishers ranked by their revenue share in the children's and young adults' book market in Germany in 2020. In the period of consideration, the Carlsen’s revenue share was at **12.10** per cent, the publisher with the highest market share.

The right statistic shows data on the book market revenue share of individual product groups in Germany in 2020 and 2021. According to it, **19 percent of book trade revenues** were generated by the children's and young adults' segment in 2021. The fiction segment had the highest revenue share after "fiction" genre.

Revenue share of publishers in the children and young people books market

2020

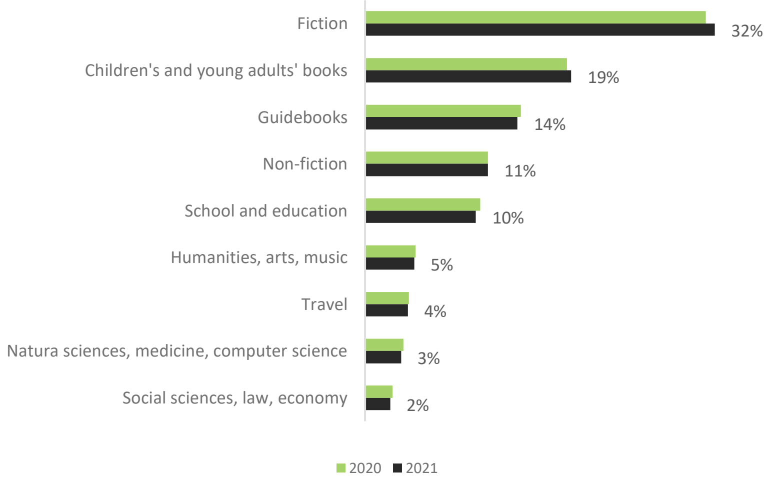
%



Books market revenue share by genre

2020 - 2021

%



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Danish publishing market – Children's magazines and books

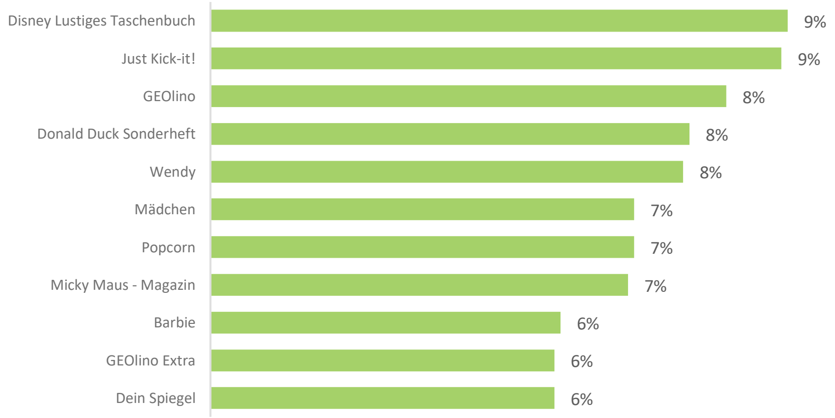
In Germany, the Disney Lustiges Taschenbunch magazine is the most popular and read children's magazine, followed by "Just Kick-it!".

The graph on the right shows the results of a survey made to 1.216 respondents on how often children read books in Germany in 2020, by gender. During the survey period it was found that over a third of children stated to read a book once or several times a week.

Reach of the most popular children magazines

2020

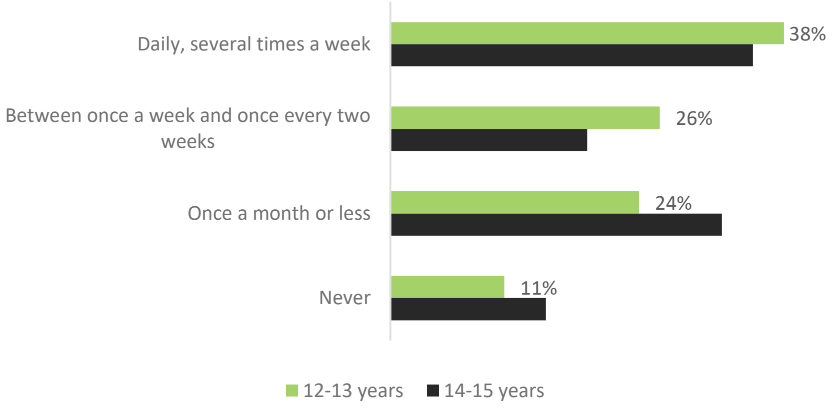
%



Children books reading frequency

2020

%



Poland

Best-selling children and young people books by copies sold

Best-selling children and young people books revenue

Book publishing revenue

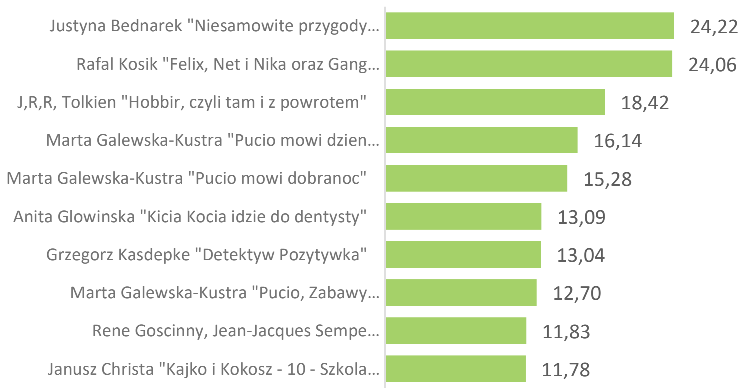
Polish publishing market – Children and young people books

In 2020, "Niesamowite przygody dziesieciu skarpetek" by Justyna Bednarek was the best-seller in the category of children's and teenage books. Bednarek sold **24.22 thousand copies** of its book in 2020.

Nevertheless, by the same year, "Felix, Net i Nika oraz Gang Niewidzialnych Ludzi. Tom 1" by Rafal Kosik was the best-seller in the category of children's and teenage books in Poland in terms of sold value. Kosik's book sales generated almost **720 thousand zloty**.

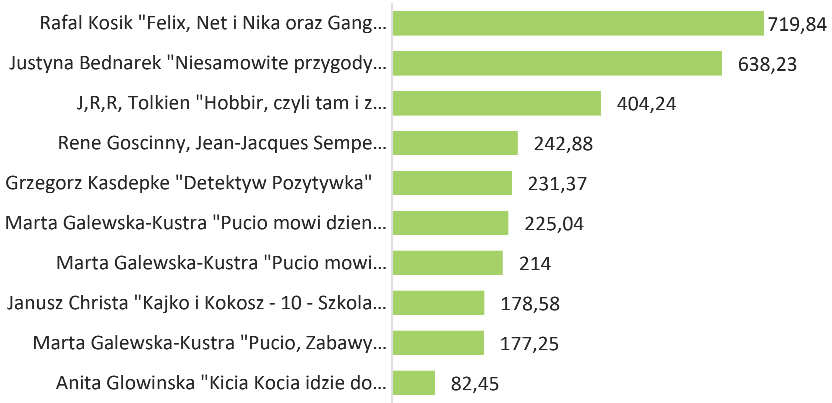
Best-selling children and young people books by copies sold

2020
by copies sold (in 1,000s)



Best-selling children's and young people books revenue

2020
by sold value (in 1,000 zloty)

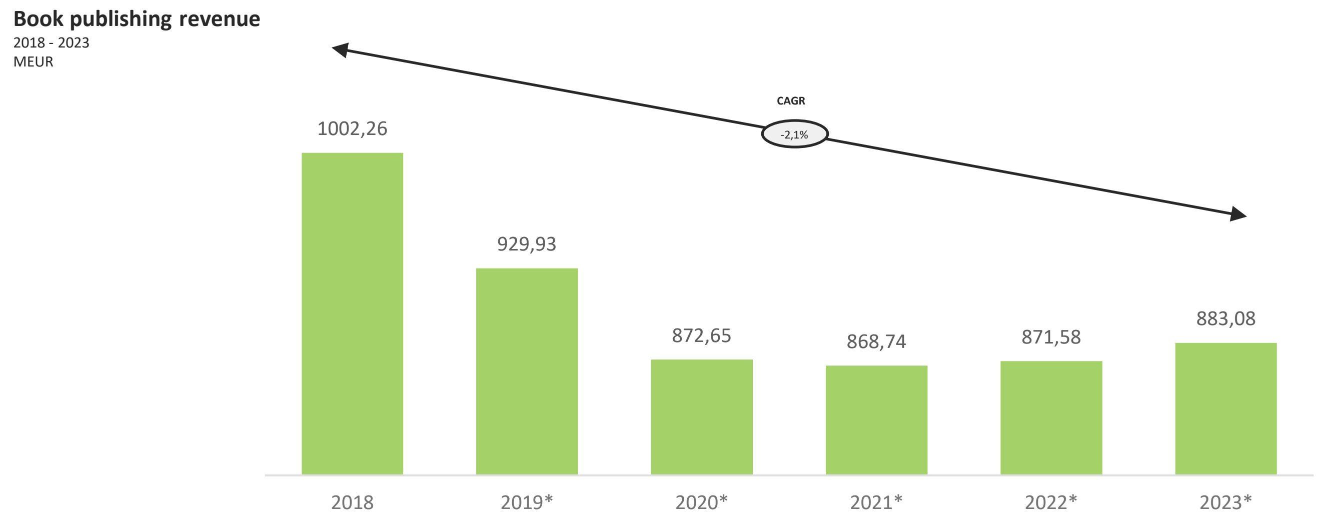


Funded by the European Union

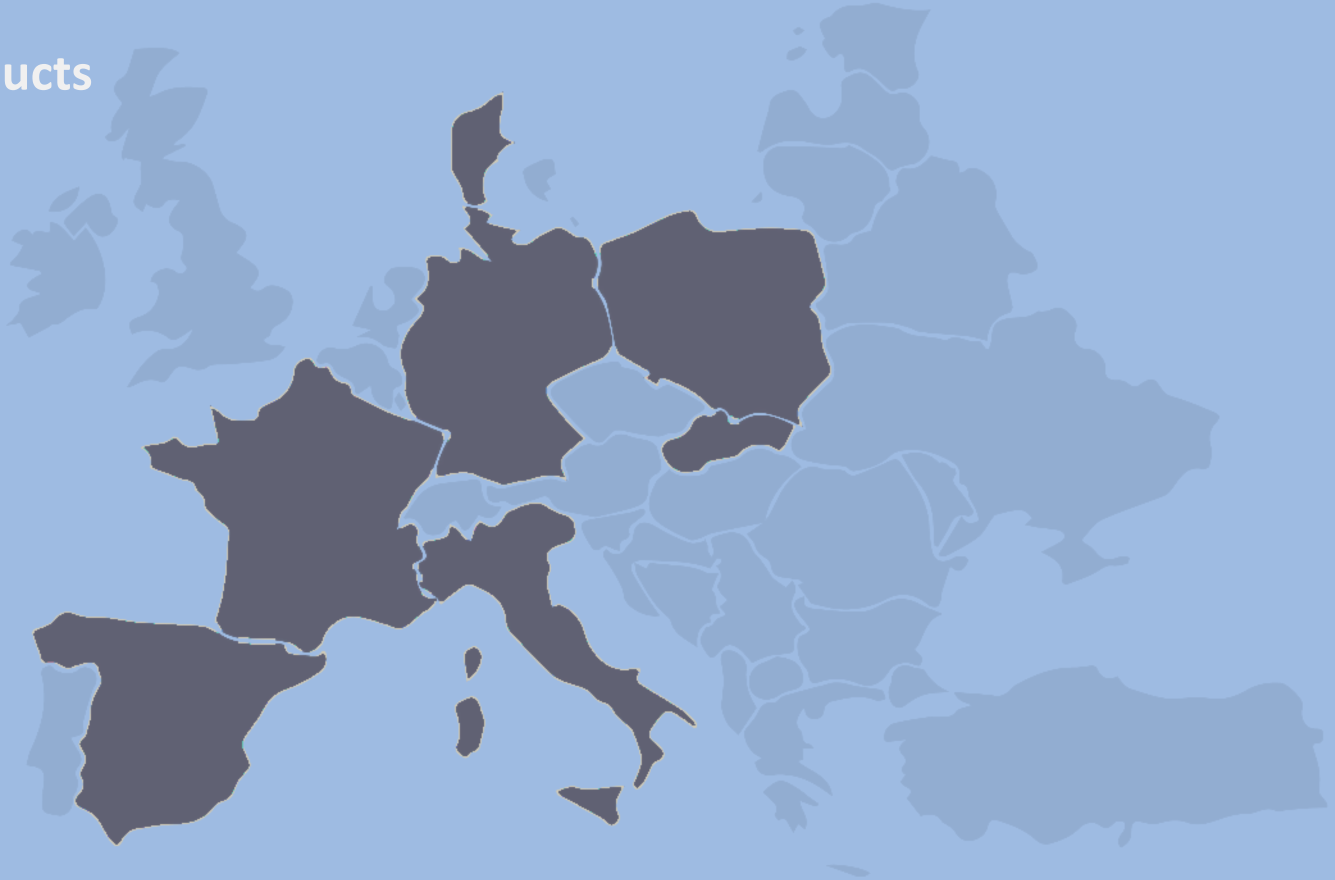
Polish publishing market – Book industry

The book publishing industry had a **total turnover of €868.74 million in 2021** and is expected to reach €871 million in 2022.

In addition, taking as a reference the years from 2018 to 2023, the annual growth rate in terms of income is expected to be negative, decreasing by **2.1%** from one year to the next.



2.2.6. Childcare Products



The segment **Childcare** includes products designed for the young and for the protection of their skin. These includes baby lotion, baby oil, baby powder and sunscreen for babies and children. Skin care products for adults, e.g. sunscreen. are excluded.

Funded by the European Union

Key findings

The European **childcare sector** is much **smaller in comparison** to other family-focused sectors analysed but it shows steady **growth in the last few years that is expected to continue**.

- The market size in 2021 was estimated at **710 M €** and is expected to reach 770 in 2023, a **CAGR of 1,1%** for 2018-2023.
- After **dip in revenue in 2020, due to the socioeconomic effects of the pandemic** on demand and consumer behaviour, market revenue is expected to **recover by 2023** beyond pre-pandemic levels.
- The 7 countries we have analysed in depth represented **almost 45% of the overall European childcare market in 2021**.
- Within the markets analysed, **France** has the largest market in terms of revenue, followed by **Germany, Italy and Spain**, and finally by **Poland, Slovakia and Denmark.** However, **t**he market is comparatively more significant in Slovakia, with an average revenue per child that is twice as higher than the average for the countries analysed.
- The group of countries analysed have grown almost 1 point above the whole of the European region in 2021 and are also expected to grow significantly more in the next year.
- **Germany and Poland are the countries with the largest expected CAGR** (2,9% in both of them), while **the Italian market is actually expected to decrease, at** –0,1% CAGR 2018-2023.

Ecommerce

All European markets for have shown a significant growth in online sales, which accelerated in 2020 due to the COVID-19 crisis. Currently, 2**0,5% of childcare product sales in Europe are online**, with an **expected 13,8% CAGR** 2018-2023.

- **France, Germany and Denmark have the highest percentage of online childrcare product shoppers** (30%, 25% and 23% in 2021 respectively).
- On the other hand, **Spanish and Italian shoppers seem to still prefer traditional retail channels for childcare products**, especially when comparing to the growth of ecommerce in other sectors: only 13,5% Spaniard's and 14,7% of Italian's childcare product purchases were online in 2021.
- **Online sales grew by 25% in the region due to COVID**, but some countries experienced even more significant growth: 31% in Spain, 30% in Slovakia.

Funded by the European Union

Europe

Revenue

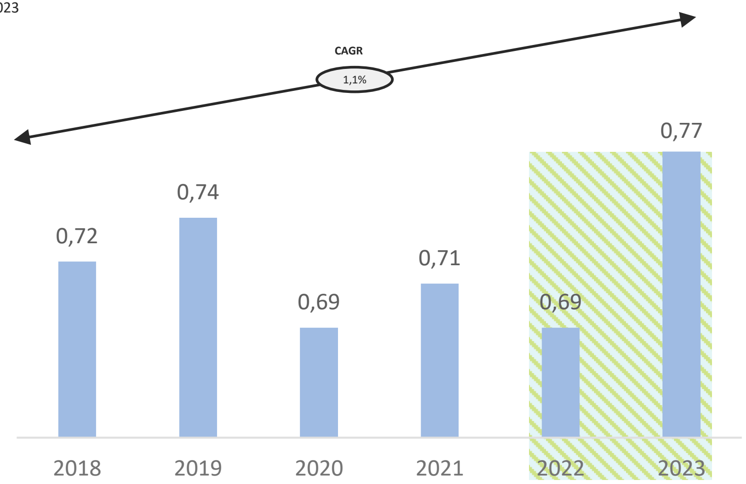
Online sales

European childcare market – Revenue & Online Sales

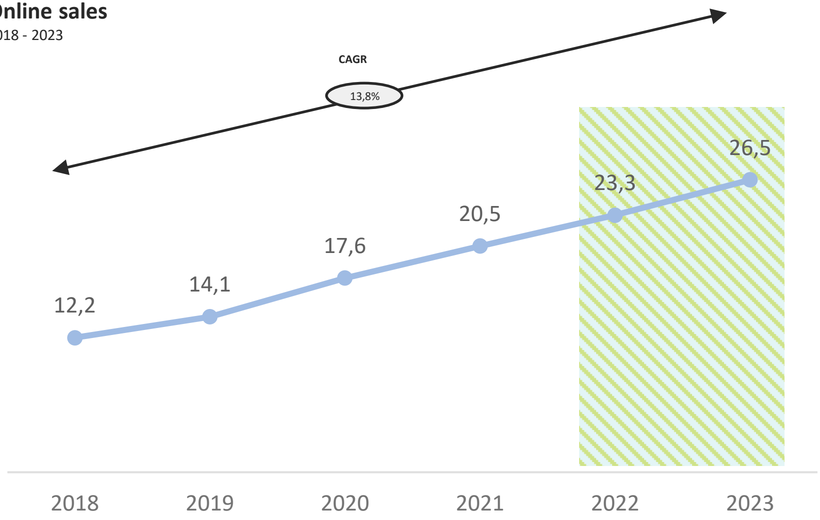
The purchase of products in the childcare sector in Europe is increasingly focused on online sales channels. In 2021, 20.5% of sales were carried out through e-commerce platforms. It is expected that by 2023, this type of sales will reach **26.5% of the total.**

As for the revenue generated by the sector, 2021's total revenue was **€0.71 billion**. From 2018 to 2023 it is expected that income will have grown 1.1% CAGR (growth from one year to the next).

Revenue
2018 - 2023
BEUR



Online sales
2018 - 2023
%



Funded by the European Union

Spain

Revenue

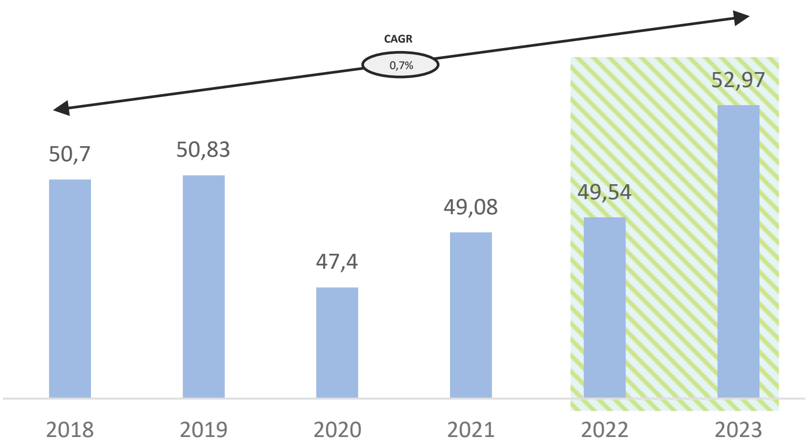
Online sales

Spanish childcare market – Revenue & Online Sales

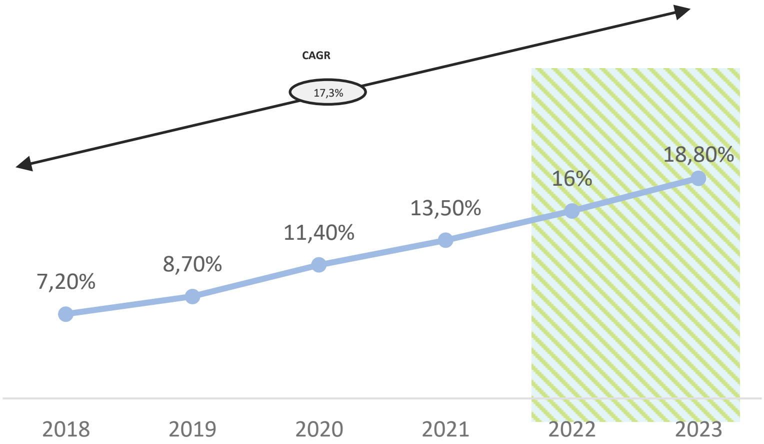
The income of the Spanish childcare sector does not stand out compared to the income of other countries. In addition, its growth from one year to another since 2018 is very slow, considering that in 2020 the income for this type of product significantly decreased. In 2023, the sector is expected to recover its pre-pandemic levels, exceeding the total income for 2018.

When it comes to online sales, there is a growing share of the market. In 2021, **13.50%** of the total sales in the childcare sector were made via online shopping channels and e-commerce sites, a much higher percentage than in 2018, which was just **7.20%.**

Revenue
2018 - 2023
MEUR



Online sales
2018 - 2023
%



France

Revenue

Online sales

French childcare market – Revenue & Online Sales

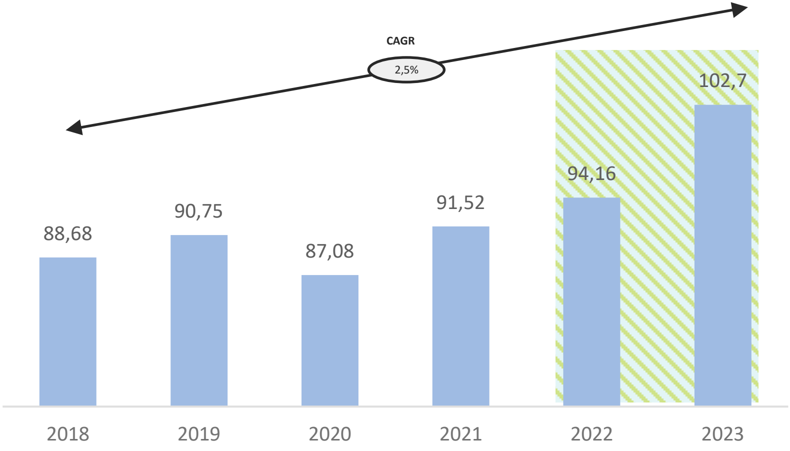
France is the country with the highest number of income in the sector. In 2021, the childcare sector totalled **€91.52 million**, a very high amount compared to other countries. This total income is expected to increase to **€102.7 million** in 2023.

The tendency to buy this type of product in online sales channels is growing, although with a lower **CAGR** than in other countries (**10.4%**) and thus, a more stable growth.

Revenue

2018 - 2023

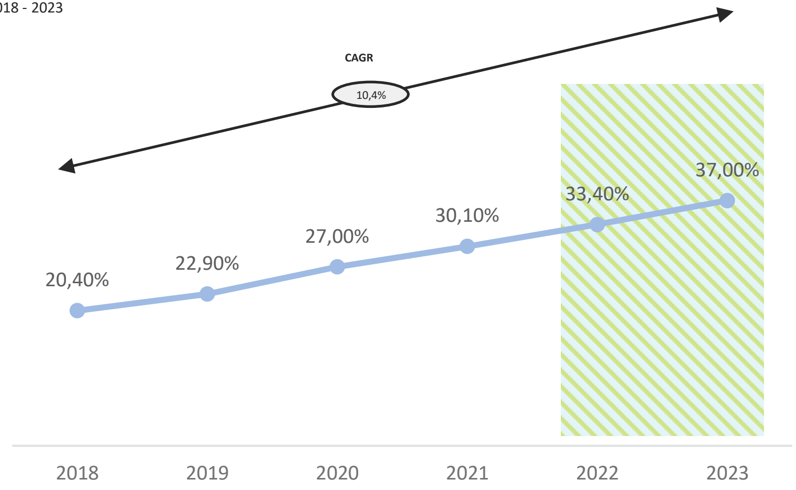
MEUR



Online sales

2018 - 2023

%



Italy

Revenue

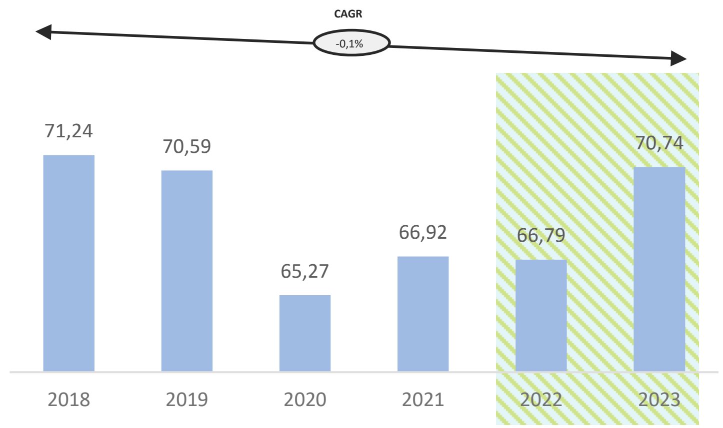
Online sales

Italian childcare market – Revenue & Online Sales

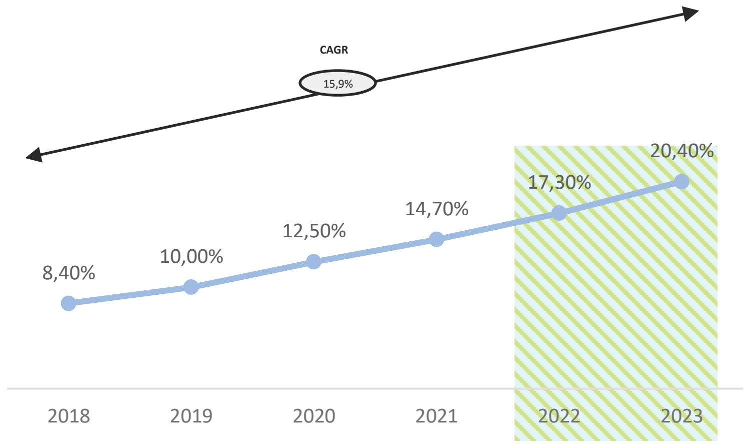
Italy stands out for being the only country in the analyses with a negative annual growth rate (**CAGR -0.1%)** in the total income of the sector, since as the graph shows, the monetary value generated by the sector has decreased since 2018, although it is expected that in 2023 it will grow again.

In the case of online sales, as in the rest of the countries, it is a way of buying this increasingly common type of product and it is expected that in 2023 online sales will represent **20.40%** of the total sales in the sector.

Revenue
2018 - 2023
MEUR



Online sales
2018 - 2023
%



Denmark

Revenue

Online sales

Danish childcare market – Revenue & Online Sales

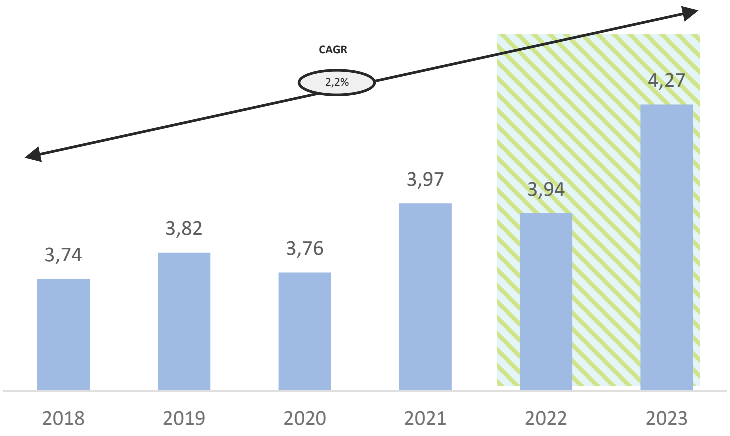
Denmark is the analized country with the lowest revenue rate made by the childcare sector, although to understand the information must take into account the reduced size of the country. Furthermore, the percentage of growth from one year to another **(CAGR) is 2.2%** if you take into account the years 2018-2023.

When it comes to online sales, the growth of one year to another and the percentage respect the total sales is significant, since in 2021, **23.3%** of the total sales made were through online sales channels.

Revenue

2018 - 2023

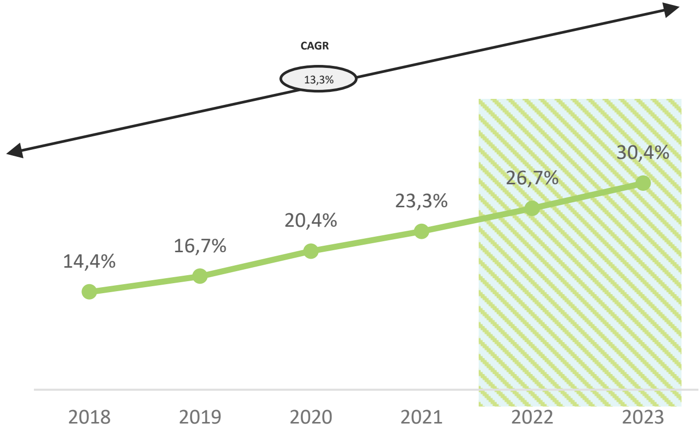
MEUR



Online sales

2018 - 2023

%



Germany

Revenue

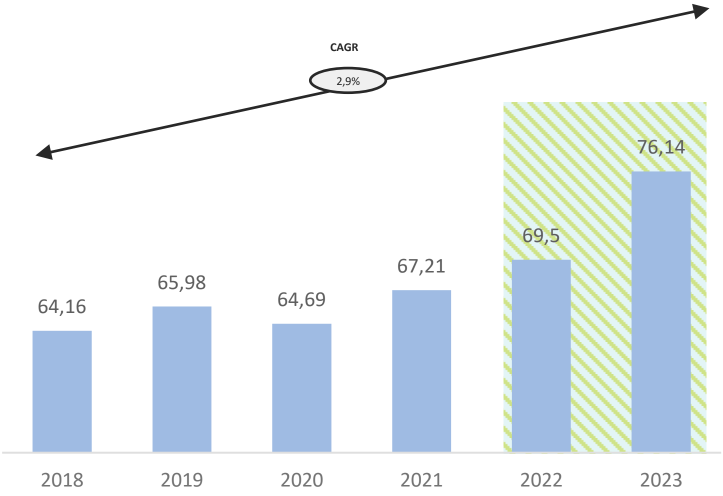
Online sales

German childcare market – Revenue & Online Sales

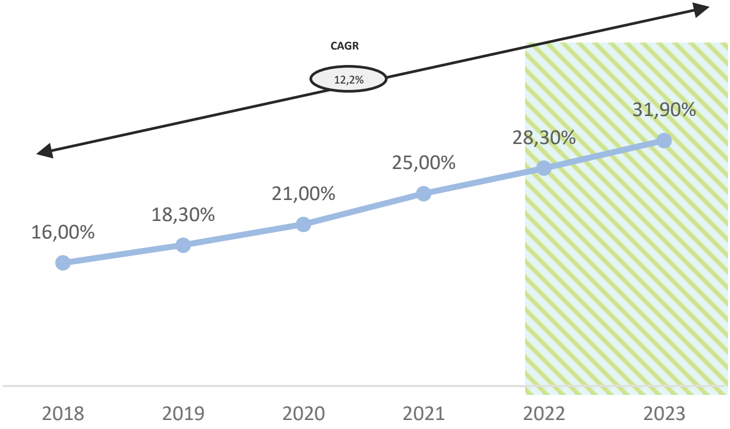
Germany has one of the highest figures in terms of income generated by the sector. In 2021, this january it generated **€67.21M** and is expected to increase by **10 million** in 2023.

Even so, the consumption of childcare products through online stores and e-commerces does not stand out for the increase in other countries, maintaining **25% of the total sales**. With a **CAGR** of **12.2%** from 2018 to 2023, the online sector is expected to account for **31.90% of total sales over the last year**.

Revenue
2018 - 2023
MEUR



Online sales
2018 - 2023
%



Poland

Revenue

Online sales

Polish childcare market – Revenue & Online Sales

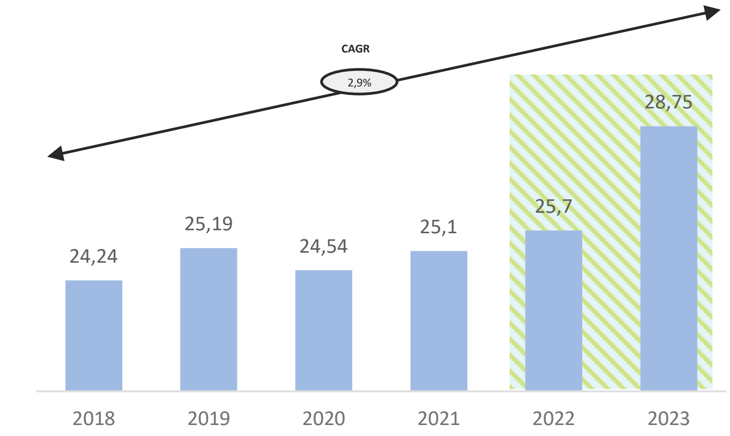
Poland is a country that, after Denmark and Slovakia, generates less monetary value in the childcare sector. In 2021, the sector generated **€25.7M,** a 2.39% more than in 2020.

In the case of the trend of buying products in the childcare sector online, Poland stands out for being one of the analyzed countries that less presents this way of consuming, since in 2021 only **18% of sales were made through online sales channels**.

Revenue

2018 - 2023

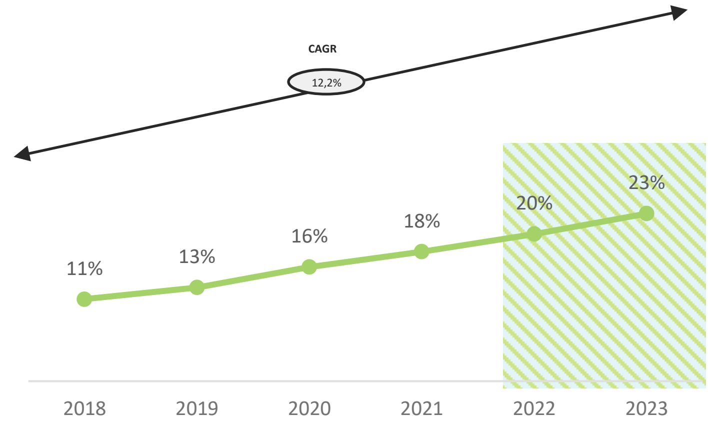
MEUR



Online sales

2018 - 2023

%



Slovakia

Revenue

Online sales

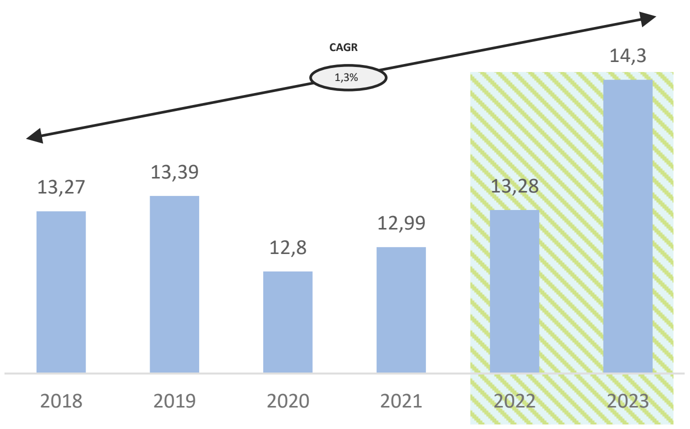
Slovak childcare market – Revenue & Online Sales

Slovakia is one of the countries with the lowest total income generated by the sector, due in part to the small size of the country. In 2021, the childcare sector only generated **€12.99M**, a figure that did not exceed pre-pandemic totals. Furthermore, it is expected that in 2023 the sector will invoice a total of € **14.3M**, exceeding the figures prior to the crisis due to covid-19.

The consumption of online sales is growing in the country and stands out in it a higher growth than in other countries, with a **CAGR** of **14.8%** from 2018 to 2023.

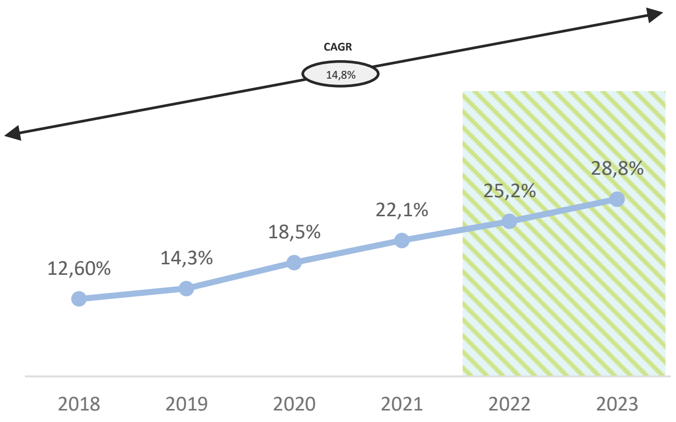
Revenue

2018 - 2023
MEUR



Online sales

2018 - 2023
%



3. Strategic Partners

3. Strategic Partners

Fort the research of the strategic partners around Europe for “Cluster Kids” we have divided in the following categories:

3.1. Associations

3.1.1. Games & Toys

3.1.2. Child Clothing

3.1.3. Food

3.1.4. Childcare

3.2. Centers

3.2.1. Research

3.2.2. Technology

3.3. StartUps & SMEs

3.3.1. Games & Toys

3.3.2. Child Clothing

3.3.3. Child food

3.3.4. Entertainment & Leisure

3.3.5. Education & publishing

3.3.6. Childcare Products

3.1. Associations

3.1.1. Games & Toys

3.1.2. Child Clothing

3.1.3. Food

3.1.4. Childcare

Asociación española de fabricantes de juguetes

Toys Association - Spain

This association has the aim to link the fabricators of toys in the Spanish territory. It's composed by the most relevant enterprises in the sector.

https://www.aefj.es/

DVSI

Toys Association - Germany

DVSI represents the interests of the toy industry in Germany. The association actively represents the concerns of the association and the member companies vis-à-vis all political bodies, especially at federal and state level, and together with the European umbrella association TIE at European level.

https://www.dvsi.de/

Toy Industries of Europe

Toys Association - Europe

Toy Industries of Europe (TIE) was founded in 1991 to represent the interests of its members to EU policymakers in Brussels and further afield. We provide information for stakeholders, members and policymakers and provide a neutral platform for discussion and exchange.

https://www.toyindustries.eu/

Legenbranchen

Toys Association - Denmark

Legenbranchen (LEG) is an association of more than 40 companies that work professionally to maintain and develop an ethical and responsible toy industry in Denmark.

There are enterprises of any size, and anyone who has a toy commerce con enter to it.

https://www.legebranchen.dk/

Funded by the European Union

Fédération française des industries Jouet Puériculture

Toys Association - France

The FJP carries out an asset monitoring of specific and general regulations for toys and childcare.

https://www.fjp.fr/

Funded by the European Union

Children's Fashion Europe

Child Clothing Association - Europe

European Children's Fashion Association that promotes and supports children's fashion companies and childcare sector in Europe.

Oh! Children's Fashion Europe

https://cfeurope.wordpress.com/

Fooddrinks Europe

Food Association - Europe

FoodDrinkEurope represents the interests of food and drink companies, national food and drink federations, and specific sectoral associations based in Europe.

https://www.fooddrinkeurope.eu/

Food Safety Europe

Food Association - Europe

The Platform brings together public entities (Member States/EFTA countries, EU bodies and international organisations) and actors in the food value chain including consumer and other non-governmental organisations. Public entities are invited by the Commission to join the Platform as members and private sector organisations are selected through an open call for applications.

https://food.ec.europa.eu/safety/food-waste/eu-actions-against-food-waste/eu-platform-food-losses-and-food-waste/platform-members_en

EUFIC

Food Association - Europe

The European Food Information Council (EUFIC), is a consumer-oriented non-profit organisation, founded to make the science behind food and health more accessible and easier to understand among the public.

https://www.eufic.org/en/

CAOBISCO

Food Association - Europe

A strong and successful Chocolate, Biscuit and Confectionery Industry, respected by stakeholders with products enjoyed by consumers as part of a balanced diet.

https://caobisco.eu/

Funded by the European Union

CEEREAL

Food Association - Europe

The European Breakfast Cereal Association (CEEREAL) represents the breakfast cereal and oat milling industries towards the European Union and its institutions, industry and consumer associations as well as consumers. Established in 1992 by eight national breakfast cereal associations, CEEREAL today counts 9 member associations in 8 European countries and 10 company members.

https://ceereal.eu/

CEFS

Food Association - Europe

European Committee of Sugar Manufacturers is an international non-profit organisation and a recognised interlocutor for the EU Institutions since 1953, sharing knowledge and technical expertise on sugar. CEFS' membership is composed of sugar-producing companies in the EU, Switzerland and the UK.

https://cefs.org/

ESA

Food Association - Europe

The European Snacks Association asbl is Europe's only trade organisation dedicated to advancing the savoury snacks industry on behalf of member snack manufacturers and suppliers, as well as national trade organisations.

https://www.esasnacks.eu/

Foods for infants and other groups

Food Association - Europe

Foods for specific groups are designed to fulfil the nutritional requirements of vulnerable population groups.

https://www.efsa.europa.eu/en/topics/topic/foods-infants-and-other-groups

Funded by the European Union

Eurochild

Childcare Association - Europe

Eurochild is a network of organizations and individuals working with and for children in Europe. We are striving for a society where all children and young people grow up happy, healthy, confident and respected as individuals in their own right. We aim to bring about positive changes in the lives of children, in particular those affected by poverty and disadvantage.

https://www.eurochild.org/

Eurochild
Putting children at the heart of Europe

Coface Families Europe

Childcare Association - Europe

COFACE advocates for strong social policies that take into consideration family needs and guarantee equal opportunities for all families. Our area of work includes social and family policy, education, disability rights, gender equality, children rights, migration, consumer issues as well as the impact of technological developments on families.

https://coface-eu.org/

Reyn - Play HUB

Childcare Association - Europe

The Romani Early Years Network (REYN) is a Europe-wide leading advocacy network that promotes professionalism in early years, access of Roma and Traveller children to quality early childhood development (ECD)

https://reyn.eu/

ROMANI EARLY YEARS NETWORK

ChildHub

Childcare Association - Europe

The Child Protection Hub is a regional initiative that promotes continuous improvements of child protection practices and policies in Southeast Europe through a participatory approach and community of practices.

https://childhub.org/en

3.2. Centers

3.2.1. Research

3.2.2 Technology

Research for Childrens

Research Center - Europe

Research center associated to the Freiburg Center for Pediatrics and Adolescent Medicine specialized in health research for kids and teenagers. The make studies about food behaviour and also clinical investigation.

https://www.research-for-children.de/

TrygFonden's Centre for Child Research

Research Center - Europe

TrygFonden's Centre for Child Research is an interdisciplinary research centre that is part of Aarhus University's faculty Aarhus BSS. The goal for the centre is to increase the well-being among children and young adults. The centre has more than 60 associated researchers in sciences as economics, pedagogy, psychology, political science, criminology, children's development and language.

https://childresearch.au.dk/en

Teddy Network

Research Center - Europe

Teddy European Network of Excellence for Paediatric Research was funded in 2005 with the aim to favor the integration of the paediatric pharmacological research activities and contribute to the promotion of safe and efficacious medicines for children.

https://www.teddynetwork.net/

Leipzig Research center for early child development

Research Center - Germany

The LFE is an institution of the Faculty of Education at Leipzig University. It consists of four core research groups, a Managing Director, a Directorate, a Scientific Advisory Board and the members. Moreover, the LFE cooperates with other research institutions in Leipzig, such as the Max Planck Institute for Evolutionary Anthropology, the Max Planck Institute for Human Cognitive and Brain Sciences and the University Hospital Leipzig.

https://www.lfe.uni-leipzig.de/en/home/

DJI

Research Center - Germany

The German Youth Institute (DJI) is one of the biggest social science research institutes in Europe. For more than 50 years it has conducted research into the life situations of children, young people and families, advising national government, the German federal states and local authorities and providing key stimuli for professional practice.

https://www.dji.de/en/about-us.html

Deutsches Jugendinstitut

Institute of mother and child

Research Center - Europe

The Institute of Mother and Child (IMC) is an academic and research institution, with 60 years of tradition and a proven track record in Poland and on the international arena. The IMC was founded in 1951 by the Council of Minister's resolution and has participated in solving health-related and social problems of mothers, children and adolescents since that time.

https://imid.med.pl/en/home

Institute of Mother and Child

AIJU

Technology Center - Spain

AIJU is the Technological Institute specialised in toys, children's products and leisure, based in the town of Ibi (Alicante). It also has premises in Valencia.

https://www.aiju.es/en/

TBkids

Technology Center - Spain

TBKids is a technology center that their main objective is to approach knowledge of technology to kids throw different ways not only as a user instead as a creators of it.

https://www.tbkids.es/

3.3. StartUps & SMEs

3.3.1. Games & Toys
3.3.2. Child Clothing
3.3.3. Child Food
3.3.4. Entertainment & Leisure
3.3.5. Education & Publishing
3.3.6. Childcare Products

Magicbox

Spain

A toy and entertainment company. The products are filled with imagination and surprise. We love the challenge of creating innovative new products that entertain kids worldwide. Magic Box's iconic brands include Gogo's Crazy Bones, Zomlings, SuperThings and much more to come.

https://www.magicboxint.com/es/

Londji

Spain

Londji is a toys manufacturer stablished in Barcelona. Their visión is make educative games beeing resposible with the enviaorment.

https://londji.com/en/

Joguines Grapat

Spain

Grapat is a small family project based in Catalonia, their main objective is to make toys for kids with wood, to make them more imaginative making them play with physical toys instead of digital ones.

https://www.grapat.eu/

Oli&Carol

Spain

Oly&Carol make natural Toys for modern parents and their children. Their offer natural rubber baby toys for teething, bathing and sensory play for infants and children.

https://oliandcarol.com/es/

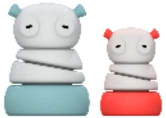
Funded by the European Union

Aisoy | Relational AI Robots

Spain

Aisoy make an interactive robot (Aiko) that help children in their intellectuall development.

https://aisoy.com/



Play Broks

Spain

Play Broks is a gaiming system that give the childrens the opportunity to build innovative and interactive designs.

https://playbroks.com/

Funded by the European Union

Janod

France

Janod is a toys Enterprise that make educative and interactive toys for children in different ages. All of their toys are eco-friendly.

https://www.janod.com/en/

Leka

France

Leka is a company that make a copanion (leka) that is a playful and educational toy for children with disabilities.

https://leka.io/en/home/

Canal Toys

France

Canal toys develop educative and ludic toys for children between ages od 3-12.

https://www.linkedin.com/company/canal-toys/about/

Tinker Bots

Germany

Tinkerbots learning products make teaching faster and more efficient! Few parts, quick assembly and compact learning units, all of which can be completed in a maximum of 45 minutes, help you teaching.

https://www.tinkerbots.de/?lang=en

Meine Spielzeugkiste

Germany

Meine Spielzeugkiste is a toy manufacturare that make toys that give children the opportunity to play extensively with joy and variety.

https://meinespielzeugkiste.de/

Mobilo

Germany

Mobilo is building and gaming system that allow children to create their own games and stories.

https://www.mobilo.net/en

Zapf Creation AG

Germany

Zapf Creation is a company specialaiced in the development of dolls sience the 90'. Their portfolio has exit cases like Baby Born or Chou Chou among others.

https://www.zapf-creation.com/en/

Funded by the European Union

Steiff

Germany

Steiff is a company specialiced in teddy-animals for children.

https://www.steiff.com/en

Funded by the European Union

Funiversity

Poland

Funiversity is a brand created out of passion for science: physics and chemistry, but of course mainly out of love for kids. Their main objective is to make toys based in scientific experiment for children to learn while having fun.

https://funiversity.pl/

Kooglo

Poland

Kooglo is a company that make a building sistema with Wood blocks and magnets to give children the oppportunity to build their own toys.

http://kooglo.com/

Szumisie

Poland

Szumisie is a company specialiced in making teddys for newborns and help them to sleep. Newborns and infants like to fall asleep with the noise, because they remember the sound from Mom's belly. Noise calms them down, calms them down and helps them fall asleep

https://szumisie.pl/

Funded by the European Union

Kuzelnecitanie

Slovak

Kuzelnecitanie is a company that make educative toys combining digital inputs with physical toys and books.

https://www.kuzelnecitanie.sk/

Justlove

Slovak

Justlove is a company that develop cloth toys and complements like bags or socks for children and adults.

https://justlove.sk/

Holotoyz

Ireland

HoloToyz is a range of kids products that come to life, inspiring creativity and imagination through the power of augmented reality. With never-seen-before amazing animations, our products will bring a moment of surprise and awe to people of all ages.

https://holotoyz.com/

Lottie Dolls

Ireland

Lottie dolls is a company specialising in making dolls for children regardless of gender.

https://www.lottie.com/

Toca Boca

Sweden

Toca Boca is a company that make different applications and toys for children betweens 3-12 years. Their main objective it’s to give children tolos to play andlearn at the same time.

https://tocaboca.com/

Rubens Barn

Sweden

Rubens Barn are a handmade line of dolls for children, the dolls are made with natural and biodegradable materials.

https://mickiofsweden.com/sv/rubens-barn/?mp=true

Funded by the European Union

Whirli

UK

Whirli is UK based online toy library (a 'Netflix for Toys'). A Whirli subscription gives parents and their little one(s) access to a huge shareable toy box for a fixed monthly price.

https://whirli.com/

Primo Toys

UK

Primo Toys is a global educational toy brand for parents and educators who want to encourage young girls and boys to explore the digital world they live in. They're the makers of Cubetto, the coding toy for girls and boys age 3 and up that will teach your child the basics of computer programming through adventure.

https://www.primotoys.com/

Tucanbox

UK

Tucan Box it’s kids craft subscription box with a simple objective; deliver quality time and educational fun, that gives kids lasting memories.

https://www.toucanbox.com/

Robo Wunderkind

Austria

Robo Wunderking have the objective to teach childrend how to code throw an interactive proces with personaliced robots.

https://www.robowunderkind.com/

LoCoMoGo

Netherlands

LoCoMoGo is a gaming system that is developed for helping kids to develop basic knowladge of computing and codig throw a simple building game.

https://www.linkedin.com/company/locomogo/

Lilliputiens

Belgium

Lilliputiens has been accompanying children's development with creative toys for 25 years. Their toys are eco-friendlies and help children to develop themselves.

https://www.lilliputiens.be/en/

Ever Toys

Rumania

Ever toys it's a startup that give toys to families regularly under a subscription.

https://ever.toys/

Lab Box

Kosova

Lab box is a delibery service of interactive elctronic toys for challenging the kids, it Works under subscriptions.

https://labbox.education/

Funded by the European Union

Bobo Choses

Spain

Bobo Choses, it’s a brand that make “fun” clothes and accessories for babies, kids and adults to play with; writing crazy children books that give meaning to their collections and designing beautiful homeware that lifts our feet off the ground.

https://www.bobochoses.com/

The Animals Observatory

Spain

The Animals Observatory, an innovative brand whose aim is to research and develop creativity in fashion, clothes, accessories and other products from the world of children.

https://www.theanimalsobservatory.com/

Tinycottons

Spain

Tinycottons is a brand with great quality products made in Europe, and treat that brand as an adults brand. Stylish but bold. With a strong image and a story behind every collection that kids get involved with, learn something or just love a piece that they'll remember forever.

https://www.tinycottons.com/eur_es/

The Campamento

Spain

The Campamento is a timeless brand for kidswear, having a serious commitment with fun and passion.

https://www.thecampamento.com/

Funded by the European Union

émoi émoi

France

émoi émoi is the French brand that celebrates the little and big moments of family life, through fashion and lifestyle collections sold 100% online on its website

https://emoi-emoi.com/

Smallable

France

Smallable is the world's leading Family Concept Store

https://www.smallable.com/en

Tartine et Chocolat

France

From child accessories to baby's wardrobe, from the softest of cuddly toys to the most meticulously designed furniture, and from little girls' and boys' collections to the Ptisenbon fragrance, Tartine et Chocolat proposes a complete offer in a timeless style that combines simplicity and quality.

http://www.tartine-et-chocolat.com/fr-fr/

KiETLA

France

French brand referent in the production of technical and ultra-resistant sunglasses for children.

https://www.kietla.fr/

Louise Misha

France

Louise Misha is “aute Couture” brand for children and families.

https://www.louisemisha.com/fr/

Liilu

Germany

Liilu is a clothes Brand that make simple clothing for families.

https://www.liilu.de/

Monkind

Germany

Kid's wear brand based in Berlin that creates sleek and modern clothes from exclusive organic materials. Relentlessly simple and modern, reassuringly organic and sustainable

https://monkind.com/

Frou Frou

Germany

Frou Frou it's a brand of high quality clothes for children. Made with eco-materials.

https://froufrou-kids.de/

Macarons

Germany

Macarons is a clothes Brand for people who care about the planet, they only use organic materials and with local production.

https://www.macarons-fashion.com/

Funded by the European Union

Noé & Zoë GmbH

Germany

The brands focus lies on high quality clothes and a fair wages and human working conditions.

https://noe-zoe.com/

Funded by the European Union

Konges Sløjd

Denmark

Konges Sløjd is a Danish high-end design brand, creates simple high-quality products in Scandinavia design – clothes, bags, toys and a selection of interior for both children and mothers.

https://kongessloejd.com/

Liewood

Denmark

Liewood is an international children's lifestyle brand designing and producing toys, interior, accessories, and selected clothing for babies and children.

https://www.liewood.com/

MarMar Copenhagen

Denmark

Established in 2008, MarMar Copenhagen is a premium Danish children's fashion brand for boys and girls. The sizes range from newborn to sixteen years.

https://marmarcopenhagen.com/

Molo

Denmark

Clothing Brand with the following philosophy: children’s design on children’s terms!

https://www.molo.com/

Mille

Poland

Millie is a children and family's clothes brand that cares about: responsibility, tenderness, exceptional quality and respect for local crafts.

https://en.millefamily.co/

Kid’s on the moon

Poland

No gravity brand for kids, created under the full moon. Dedicated to children with heads full of dreams and reaching for the stars in their everyday life. Best for night walks on roofs, playing with stardust, and formal meetings with UFO.

https://kidsonthemoon.com/en/

Murgala

Poland

Muragala is a polish Brand of children clothes produced locally and with ecologic concience.

https://sklep.mrugala.pl/

Zombie Dash

Poland

Zombie dashe is a clothe’s Brand for “rebel” children who don’t want to follow simple and stanard clothes.

https://zombiedash.pl/

Funded by the European Union

Mile

Slovakia

Clothing Brand for children and families with unique personality, environmental awareness and a playfull mind.

https://mile.sk/en/

Rak

Slovakia

Rak is a Slovak shoe Brand started in 1993, using high quality materials to make unique shoes for children.

http://rak-obuv.sk/index_en.html

Little People

Slovakia

Little People is a family brand that was created as a combination of functionality and style into an outfit for small children.

https://www.littlepeople.sk/

Moe

Slovakia

Moe is a brand that arose from the desire to bring to the market minimalist, but still playful children's products with an unusual authorial design and quality workmanship. Those that will be memorable, easy to combine, popularly worn by several generations of children, and pleasing to the eye.

https://www.moe.sk/

Funded by the European Union

Mini Rodini

Sweden

Mini Rodini was founded in 2006 and is today one of Sweden's fastest growing brands in sustainable clothing for children

https://www.minirodini.com/en-eu

Hyber

Stockholm

Hyber is a Scale Up that their main activity si renting children apparel. A fun, sustainable and smart service for children to always be able to wear the right clothes in the right size. (based in Stockholm)

https://hyber.com/

Maan

Belgium

Vicky Vinck,who studied at the Antwerp Royal Academie, creates new wonderful pieces year after year.

https://www.maankids.be/

Caramel Ltd

UK

Caramel was created in 1999 by former lawyer Eva Karayiannis, a designer with a strong vision and immense passion. The label was originally conceived to challenge traditional, limited perceptions of childrenswear.

Distinctive British design for woman, child, baby and home.

https://www.caramel-shop.co.uk/

Smileat

Spain

Smileat is a new organic baby food brand. They make and sell tasty and healthy organic baby food for babies and kids.

https://www.smileatbaby.com/

Alnut

Spain

They are specialists in the development and production of a wide range of infant and family food products, from fruit and vegetable purees with meat or fish, to dairy desserts, smoothies and vegetable alternatives to yoghurt.

https://www.alnut.com/

Babybio

France

Specialists in organic baby food for more than 25 years, Babybio contributes to the development of babies through the discovery of authentic flavours and food that is close to "home-made".

https://www.babybio.fr/en/

Good Goût

France

Good Gout make food for babys with 100% organic baby recipes, with the real taste of fruits and vegetables.

https://www.goodgout.com/

Yooji

France

Yooji offers delicious frozen meals for babies. The recipes are prepared with organic or sustainably sourced ingredients, with no additives, added salt or gluten.

https://www.yooji.fr/fr-fr/

Mia & Ben

Germany

Mia and Ben It’s a start up of healthy snacks for children. Offerssustainable children's products at the cutting edge of food technology. Products that are 100% plant-based and as healthy as possible. Products that are perfectly matched to the nutritional needs of children.

https://mia-ben.com/

Little Tumy

Germany

Little tumy is a startup that make organic, healthy and tasty food for babys; based in germany, and expanding. The idea is to make this food out of vegetables not so common in our daily diet.

https://littletummy.co/

FruchtBar - jufico GmbH

Germany

Family business offering organic fruit purees and snacks for children. 100% organic, with no added sugars and no other additives.

https://www.fruchtbarewelt.de/

Nuri

Germany

Nuri offers 100% sustainable, organic and healthy baby food. Apart from this, their philosophy is: "How is it possible that adults eat superfoods, paleo or gluten-free food and the little ones have been getting canned food for over 60 years?”

https://nuriforbabies.de/

Funded by the European Union

Ovko

Slovakia

Ovko is a company that makes sustainable, healthy and tasty children's food based on children's opinions.

https://ovko.sk/

My Little Picolo

UK

Who said healthy isn't tasty? It's all about balance. We hear you: babies + balance… not your typical duo. But our range is here to help give your little one the best start in life.

https://www.mylittlepiccolo.com/#

Annabel Karmel

UK

Annabel Karmel is a leading consumer lifestyle brand synonymous with mums and parents all over the world. It sells recepies for families.

https://www.annabelkarmel.com/

Babease Foods

UK

Food for babies, not baby food! Made in the UK. Veg-led. No hidden fruit. Real food.

https://www.babease.co/

Organix

UK

Organix creates tasty and nutritious children's food using the best organic ingredients.

https://www.organix.com/

Cook School

UK

Cook School is a nationwide, innovative and exciting project offering accessible, achievable and affordable cookery lessons to children.

https://cookschool.club/

Yamo

Switzerland

Yamo is a food company for children. All the food is plant based, delicious, fresh and nutritious. All made for children to enjoy food.

https://www.yamo.bio/en-de/

Holle baby food

Switzerland

Holle is a Swiss family-owned company with a long tradition, offering a complete range of more than 90 products for babies and toddlers of the highest ecological quality.

https://www.holle.ch/

KiBi

Spain

KiBi is an R+D+i and marketing brand of smart toys, a new generation of Games and Toys that connect with new technologies, as well as Video Games that connect with Toys.

https://kibitoys.com

Peekaboo Animation

Spain

Peekaboo Animation develops, produces and distributes children's and youth animation content for television and new platforms. Peekaboo manages its own titles, and they also represent third party projects internationally, exploiting intellectual property.

http://www.peekabooanimation.com

Tomavision Studio

Spain

Tomavision Studio is an Emmy nominated production company with over 15 years of experience in the 2D & 3D animation industry dedicated to develop and produce premium kids content.

http://www.tomavision.net

Nannyfy

Spain

Nannyfy TV has arrived to revolutionize K12 EdTech sector with entertainment, socialization and learning. Athe App is a place where children can enjoy online content directed by Teachers experts in each subject with other children of the same age or through individualized tutorials. Always offering safe and quality content that promotes learning.

https://www.nannyfy.com

Funded by the European Union

A-Champs

Spain

A-Champs is a SportsTech company that develops easy-to-use, playful and science-based smart technology for training.

They created ROXs Pro – the game changing smart training assistant for Sports, Fitness and Health Pros.

ROXs Pro trains body & brain via interactive training experiences, making every session more engaging and effective.

http://www.a-champs.com/

OCTOPUS

France

Octopus Watch³ is the third-generation of our icon-based watch that empowers kids (2 to 12 yo) by teaching good habits and the concept of time, while also encouraging them to stay active with its fitness tracker. It develops functional skills, encourages independence, and helps follow daily routines to increase desirable behaviors.

https://www.heyjoy.io/

Funded by the European Union

99 Math

Spain

99 Math it's a free math games to master fact fluency and curriculum standards. It's similar to Khoot but applied for children and math's.

https://99math.com/

Go Student

Spain

Go student is a platform of online and presential lessons. The main objective is to achieve children to understand and improve in the subjects that are difficult to them.

https://www.gostudent.org/es

EdInventa

Spain

EdInventa has received a grant of the European Union and Junta de Andalucía from the European Regional Development Fund for the modernization of the enterprise, which aims to create, distribute and market new Serious Games. They create virtual reality games to learn languages and mathematics. Award-winning educational games for children up to 12 years old.

https://www.edinventa.com/

MELBOT

Spain

They combine art and innovation to make games "with a soul". They develop unique art, evocative worlds and disruptive technology to ultimately deliver interactive magic. They are the creators of the adorable IP Melbits™ .

http://www.melbot.es

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Lingokids

Spain

The playlearning™ app for more than 40 million families around the world. They teach kids important skills in English and help them discover their natural superpowers: Creativity; Collaboration; Critical thinking; Communication. These are some of the skills that children need to thrive. Parents can join the adventure of learning too.

http://www.lingokids.com

MiCuento

Spain

MiCuento is a mobile and collaborative reading platform where kids become the main characters of their favorite stories and invite their friends and family to be part of interactive book apps. Basically, MiCuento comes to take out the dust from traditional children's books, proposing a book 3.0: digital, personalized and collaborative.

http://micuento.com

Innovamat

Spain

InnovaMat aims to revolutionize the learning of mathematics by transforming the classroom and the relationships that exist in it to excite, stimulate and motivate students. The materials put the student at the center of their own teaching-learning process and allow them to develop autonomy and critical thinking.

https://www.innovamat.com/

FABA

Italy

FABA wants to become the reference brand in the edutainment market by fostering the union between smart toys and editorial audio content, dedicated to children from 0 to 10 years.

FABA aims to improve the lives of children, allowing them to play, have fun and learn at the same time.

https://www.myfaba.com/

Tonies

Germany

Tonies creates a way for children to experience storytelling in a digital age that stimulates their imagination while being educational and fun but also, and this is the main point, a screen-free experience!

It's made for kids (and parents) who want to feel good about their entertainment at home and to bring back imagination in its purest form.

https://tonies.com/en-eu/

Edurino

Germany

Edurino works closely with educators and experts to make digital education tangible for children. Their first product is a hybrid learning app that is unlocked by haptic figures.

https://www.edurino.com/

scoyo GmbH

Germany

scoyo is a learning platform to support children and their families in learning for school. The game-based learning offer puts you in a good mood while practicing and brings good grades home. Math, German, English, Biology, Physics, Chemistry and others.

http://www.scoyo.de

buya

Germany

buya is a marketplace for live-online-learning. Interactive, social and safe learning experiences for children from 3 to 17 years old. Their in-school and extra-curricular live-online courses are taught by hundreds of certified online teachers.

http://www.buya.de

Funded by the European Union

EIDU

Germany

EIDU has set out to transform education systems worldwide through the most efficient and impactful digital platform, including teacher support, student learning content, and government empowerment. They focus on pre-primary and primary education.

http://www.eidu.com

Framily

Germany

The online shop Framily is a pioneer in personalized children's books and digital storytelling. They create personalized reading experiences with all the well-known children's book heroes that fascinate children. Each book is printed individually for the customer (print-on-demand) and sent directly to the desired address.

https://www.framily.de

EMYS

Poland

EMYS Robot is the first educational English native robot friend and the most socially advanced and expressive robot in the world.

EMYS is the first to combine modern research in language acquisition studies with Common European Framework requirements and the most advanced technology.

http://emys.co

Kide

Finland

Kide Science platform offers the most engaging model to break the mold and give teachers the confidence to teach inquiry-based lessons with play and stories to children aged 3-8.

https://www.kidescience.com/en/

Twin Science & Robotics

UK

Twin science and robotic is an educational platform that tries to equip kids with the tools and knowledge they need to overcome tomorrow’s biggest challenges with online videos and tutors.

https://www.twinscience.com/en/

pi-top

UK

pi-top is one of the fastest-growing ed-tech companies with a unique vision to increase access to coding and technical education through project-based learning. pi-top’s award-winning hardware and software ecosystem is used around the world blending physical computing and project-based learning with Computer Science and STEAM education.

https://www.pi-top.com

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Lullaai

Spain

Lullai it’s a StarUp that help parents with baby sleeping. They made this using an app that give support to the parents putting them in contact with an expert that guide them.

https://lullaai.com/

Nobodinoz

Spain / France

Nobodinoz is the eco-friendly European leader who offers a complete universe for babies and children. They are a manufacturing brand with values based on short-distance production chain between France and Barcelona. They develop and manufacture all their products internally. They make furniture, toys and textile decoration using natural materials creating trend-setting designs.

https://www.nobodinoz.com/

Bebeboutik

France / Spain / Italy

Bebeboutik is a private sales website specialized in ítems for moms, babies and children up to 12 years old. They provide clothes, toys, childcare products and decoration from more tan 900 brands up to 70% off. There you can find big brans, but also small brands with interesting concepts: fair trade, ecology, originality, ingenuity, etc.

https://www.bebeboutik.com/

Tajinebanane

France

Tajinebanane is a 100% single-brand dedicated just to breastfeeding. It has it complements manover 20 people in its team and a store, which opened in May 2021, Nicknamed the Mom sweet home. They also have distribution points in France and around the world. Moreover, they are strongly committed to charitable actions to help associations.

http://www.tajinebanane.fr

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OYOY Living Design

Denmark

OYOY wants to be the strongest Danish design brand offering home accessories for children, adults and the homes they live in. They strive to be respectful and dedicated to the manufactured products, all involved people and our surrounding nature – always with a creative and playful approach in mind.

https://oyoylivingdesign.com

ferm LIVING

Denmark

Ferm LIVING creates collections of furniture, accessories and lighting, so you can create space to feel comfortably you.

Based on a passion for authentic design and clear functionality, they challenge themselves to shape the future and take pride in creating products that help you balance the contrasts of life.

http://www.fermliving.com

BIBS

Denmark

BIBS is a premium Danish childcare products brand. Their journey started with the iconic 'Colour' pacifier which since has been joined by many new designs and categories. They are a visionary company with high standards for quality and uniqueness in everything they do, with a strong focus on sustainability, functionality, and safety.

http://www.bibsworld.com

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mara mea

Germany

Mara mea is a boho-inspired womens wear brand that offers diaper bags, maternity dresses & accessories which are tailored to the necessities of both - modern moms and women.

http://www.maramea.com

Villo Design

Slovakia

Villo Design decided to make high quality design products that are both, a piece of furniture and a toy at the same time. Their aim is to fuse fun and play, practically in order to enrich the childhood of kids, as well as easing the role o parents.

https://www.villo.design/

Rischino

Slovakia

Rischino is a family business that offers Carriers and scarves. They cover the entire production process in Slovakia. In this way, they directly supervise the quality of their products, increase employment and revive disappearing professions. Carriers and scarves are made from certified organic cotton and organic cotton.

https://www.rischino.sk/

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Elvie

UK

Elvie Pump, the silent, wearable electric breast pump designed to discreetly slip inside your bra. That way, you can confidently collect breast milk where other motherpumpers dare not go.

https://www.elvie.com/en-us

YoungPlanet

UK

Founded by parents to address the inherent waste, product obsolescence and cost of raising children as well as to help declutter modern homes and keep things out of landfill, YoungPlanet is a platform and app designed to 'turn the stuff you don't need into the things that others enjoy'.

https://www.youngplanet.com/circulated

BabyBjörn

Sweden

BabyBjörn products are sold in fifty countries, worldwide, but we are still based in Sweden and a family-owned company.

Their goal is to make everyday life easier for families with small children by developing premium quality, safe and functional products for children up to the age of three.

http://www.babybjorn.com

Elodie Details

Sweden

Eloide is a creative brand with a wide range of innovative baby products that can be found all over the world.
Their aim is to develop everyday baby products with design and functionality beautifully combined.

http://www.elodiedetails.com

Babymoon

Netherlands

Babymoon supports the World Health Organization's recommendation to move from using simple carriers to using solutions which support infant-attachment. They leverage millennia of effective parenting, by replacing common baby carriers with engineered babywearing solutions to achieve better infant & toddler healthcare outcomes.

https://babymoon.care/

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4. Bibliography

Resources used to conduct the study:

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- Asociación Española de Fabricantes de juguetes. Link: https://www.aefj.es/paginas/presentacion-del-sector
- Renub Research. Link: https://www.renub.com/france-toy-market-p.php
- Global Toy News. Link: https://globaltoynews.com/2022/01/30/france-2021-toy-market-results-and-analysis-by-yann-fresnel/
- Economic and Commercial Office of the Embassy of Spain in Copenhage. Link:

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- ICEX. Link: file:///C:/Users/SDLI/Downloads/doc2021885487@a%20(1).pdf

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