



China Film Industry Report, 2011

Sep. 2011

This report

- ◆ **Analyzes the film industry development in China.**

- ◆ **Focuses on film production and film distribution industry, also Cinema Circuits & Cinemas in China.**

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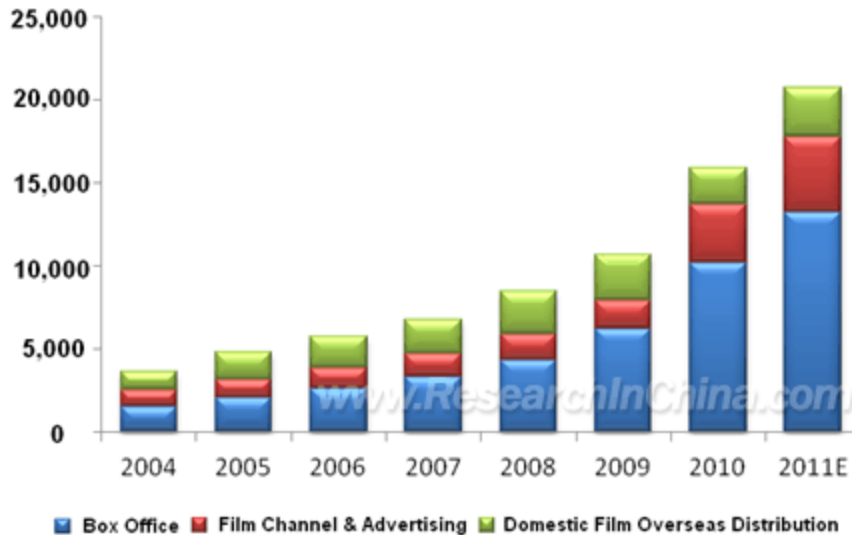
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Abstract

In 2010, the consolidated revenue of China film industry approximated RMB16 billion, an increase of 48%. Currently, box office, which was about RMB 5.7 billion in H1 2011, is still the main revenue source and core impetus for growth of the film industry in China.

Operating Revenue Structure of China Film Industry, 2004-2011
(Unit: RMB mln)



Source: ResearchInChina

In the field of filmmaking, 70% of content making is completed or participated by private film production institutions. In 2010, China produced 526 feature films, ranking third globally, and the film output is expected to increase by 70% year on year in 2011. However, due to little improvement in filmmaking quality and limited number of screens in China (less than 9,000 currently), only one third of the films produced are available to the audience.

In the field of film distribution, there are about 300 distributors in Mainland China, wherein private companies hold 90%, while foreign ones are not yet allowed to participate in this link. The top 10 companies including China Film Group, Shanghai Film Group, and Huayi Brothers occupy over 80% market share.

In the field of film screening, Wanda Cinema, China Film Stellar, Shanghai United, etc. occupy top ten spots in recent three years. China has become the fastest growing region in the global IMAX business, by mid-2011, 48 IMAX theatres have been built up, and the number is expected to reach 181 in 2015. It is predicted that in 2011, there will be over 8,900 screens nationwide, including more than 2,500 3D ones.

Huayi Brothers is the most well-known comprehensive entertainment group in China and the most noted film production company as well. In H1 2011, the company achieved revenue of RMB330 million and net income of RMB63 million, of which the revenue from films reached RMB141 million. The company introduced Plan H to further push up the box-office receipts, and will release 8 movies in 2012, with the total box-office revenue exceeding RMB2 billion.

Poly Bona is the largest professional film distribution company in China. In H1 2011, the operating revenue of the company reached US\$36.01 million, with net income of US\$1.35 million. The company was listed on NASDAQ Stock Market in October 2010 and the funds raised were mainly used in the acquisition of cinemas and in the purchase of film distribution rights.

Enlight Pictures is one of China's three major private film companies, investing in and distributing more than 15 mainstream movies every year. In 2010, the company realized box-office receipts of RMB314 million, accounting for approximately 5% of the box-office revenue of domestic movies.

In terms of box-office receipts, Wanda Cinema is the largest cinema chain in China, making up around 16% of Chinese film market. In 2012, Wanda plans to expand its cinemas to 120 and its screens to 1,100, and its market share of box-office revenue is expected to surge to over 20%.

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