



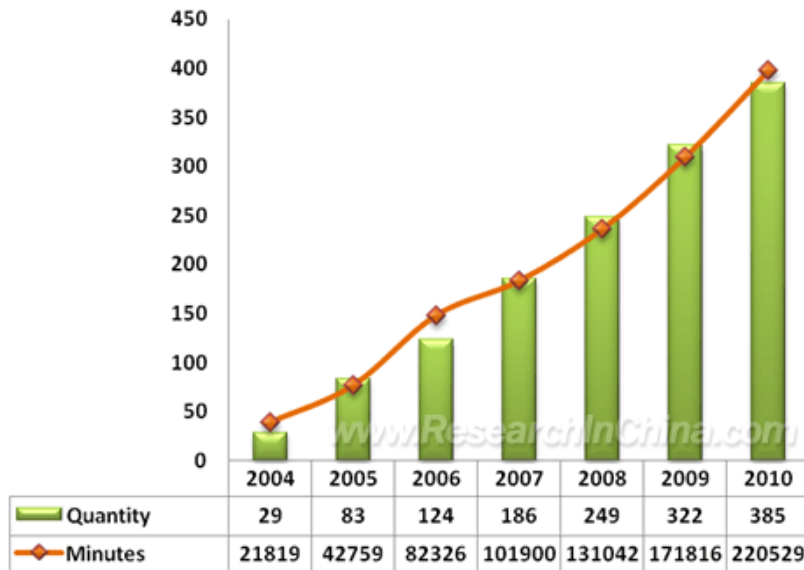
**Global and China Animation Industry
Report, 2011**

Nov. 2011

Abstract

In 2010, the total output value of animation industry in China increased by 27.8% year-on-year to RMB47.084 billion. In 2015, the total output value is expected to reach RMB 120 billion, and the market scale of overall industry Chain will surpass RMB200 billion. However, the market occupancy of domestic animation industry still remains small, which was no more than 12% in 2010, a steep decrease over the past two years.

Completed Domestic TV Cartoons in China, 2004-2010



Global and China Animation Industry Report 2011 highlights:

- ◆ Overview of animation industry; animation industry in the United States, Japan and other countries; industry scale, market occupancy, product type of China's animation industry;
- ◆ Production and product registration of TV animation industry; overview of animation film market; analysis of film production, comics publication industry, new media animation, animation derivatives, animation industry base;
- ◆ Analysis of 7 key foreign animation enterprises, namely, Disney, Bandai Namco Group, Pixar Animation Studios, DreamWorks, Toei Animation, Production I.G, and Sotsu; analysis of 12 typical China-based animation enterprises, including ALPHA, Talkweb Information, Toonmax Media, Huawei Toys Craft, IDMT, Jiang Toon Animation, Greatdreams, Skynet Asia Culture Communication, CCTV Animation, Sunchime Group and Zhongnan Group Cartoon Television.

Source: The State Administration of Radio, Film and Television;
ResearchInChina

Since 2004, the number of Chinese animation production enterprises has been on the rise, with the number of enterprises engaged in the production of TV cartoons rising to 200 in 2010 from 15 in 2004. Meanwhile, a host of registered animation film production institutions have emerged, with the figure increasing to 68 in 2010 from 25 in 2008..

ALPHA: In H1 2011, the operating revenue increased by 54.66% year-on-year to RMB478.02 million, and the net income grew by 30.22% year-on-year to RMB59.34 million. Presently, it focuses on the business model of “animation plus toy”, with the core value resting with animation content, and the profit largely sourcing from the sales of animation toys.

Talkweb Information: In H1 2011, the operating revenue from its mobile phone animation business increased by 81.23% year-on-year to RMB52.018 million.

Huawei Toys Craft: In H1 2011, among all the company’s businesses, in terms of operating revenue, intelligent toy business occupied the top position with nearly RMB80 million; in terms of gross margin, animation toy business ranked the first place with 32.53%.

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