



China Film Industry Report, 2012-2015

Dec. 2012

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications.

Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include National Bureau of Statistics of China, and Company Reports etc.

Abstract

From January to October of 2012, China film industry gained the box office of RMB13.27 billion. Taking into account the contribution of the traditional Lunar New Year holiday, China's film box office throughout 2012 is expected to reach RMB15.6 billion. The future Chinese film market will maintain a growth rate of about 20%.

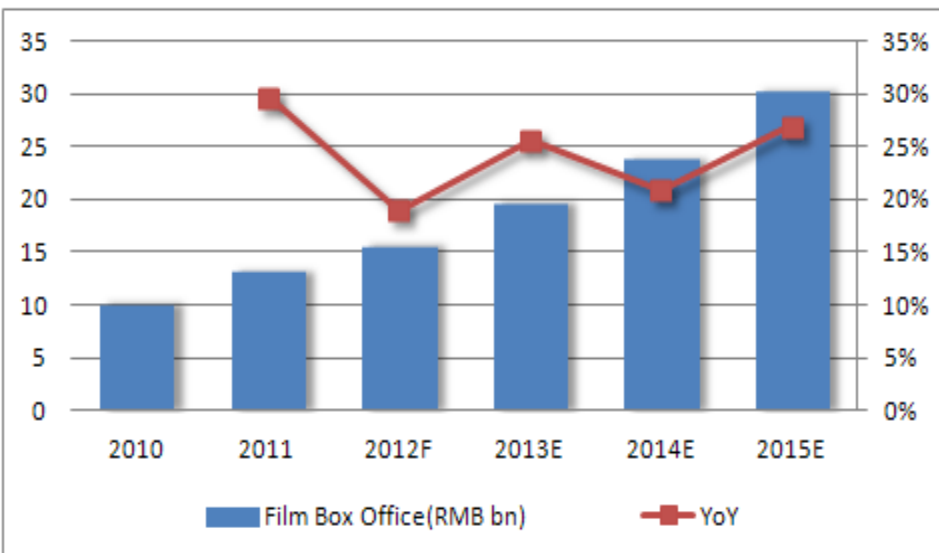
In 2012, China increases additional quota of 14 profit-sharing imported films based on the original quota of 20 per year. The new quota stimulates the domestic box office, but exerts a great impact on the domestic films. During the first three quarters of 2012, among the films with the box office of more than RMB400 million, imported blockbusters showed obvious advantages; especially, imported films accounted for 75% of all the films with the box office of more than RMB700 million, and contributed 82.6% to the total box office.

Under the premise of unchanged policies on the qualifications for distributing profit-sharing imported films, China Film Group and Huaxia will continue to monopolize the market of imported film distribution. At the same time, due to the strong demand for high-quality films, blockbuster publishers have enjoyed bigger bargaining power. In November 2012, five major distribution companies, namely China Film Group, Huayi Bros, Enlight Media, Bona and SMI, suggested cinema chains to raise the income-sharing proportion of the box office to 45%, covering 9 films launched in the Lunar New Year holiday.

Eight major cinema chains monopolize the film screening field. In the first three quarters of 2012, Wanda, China Film Group SMI, China Film

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Film Box Office and Growth Rate in China, 2010-2015



Source: State Administration of Radio, Film and Television;
ResearchInChina China Film Industry Report, 2012-2015

South Cinema Circuit, Guangdong Dadi, Shanghai United Circuit, Jinyi Zhujiang Movie Circuit, Beijing New Film Association and Zhejiang Time Cinema achieved the total box office of RMB8.628 billion, with CR8 of 70.83%. Wanda's "cinema + commercial complex" development model represented apparent advantages. The quarterly box office difference between Wanda and eight major cinema chains rose from RMB154 million in 2012 to RMB302 million in the first three quarters of 2012.

Starting from China film industry chain, the report analyzes and researches status quo, development trends and competitive patterns of China film industry, including:

- Forecast for the scale of China film industry and development in 2013-2015;
- Relevant industrial policies;
- Status quo and competitive patterns of Chinese film market segments;
- Status quo, operation, development trends and market share of 24 major enterprises.

Preface

1. Overview of Film Industry

1.1 Authorities

1.1.1 The Department of Publicity of the Communist Party of China (CPC) Central Committee

1.1.2 Film Administration Bureau of State Administration of Radio, Film and Television (SARFT)

1.1.3 China Film Association

1.1.4 China Film Copyright Industry Association

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