



**Global and China Animation Industry
Report, 2012-2015**

Mar. 2013

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 Company Reports, and National Bureau of Statistics of China etc.

Abstract

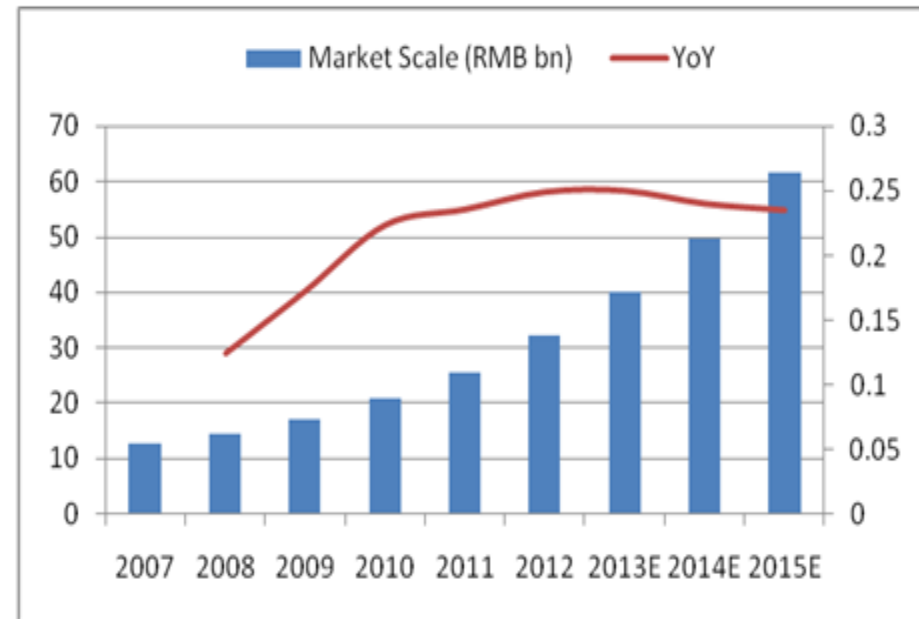
So far, the output value of global animation industry has reached US\$222.8 billion, and animation-related derivatives have exceeded US\$500 billion. The animation industry has gradually become a pillar of the national economy and new economic growth engine in some countries. American animation has developed as the America's sixth largest pillar industry; in Japan, the animation industry has outperformed automobile, iron & steel industries to be the third largest industry; and South Korea has undertaken a nearly 1/3 of the global animation production business.

Compared to the United States, Japan, South Korea and other developed countries, China's animation industry is still in its infancy. Chinese animation market size in 2012 reached RMB32.1 billion, a year-on-year increase of 24.9%. We hold the opinion that with the start-up of the animation industry chain consumption as well as the support of national policies, there will be more broad space for development of the Chinese animation industry.

For the animation industry, earnings and revenue come not only from the animation content production (cartoons, animation movies, etc.), but also from derivatives (cartoon toys, anime costumes, theme parks, etc.). At present, a complete industrial chain of Chinese animation industry is taking shape, but different from the United States, Japan and other

countries, there appears the phenomenon of inverse industrial chain, i.e. some enterprises set out to develop derivatives, and then nurse the original animation, represented by companies with such operation mode including Guangdong Alpha Animation and Culture Co.,Ltd and Guangdong Huawei Toys Craft Co., Ltd..

Market Scale of Animation Industry in China, 2007-2015E



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

Alpha Animation has now established a complete animation industry chain, covering content chain (anime images like “Armor Hero”, “Blazing Teens”, “Balala Little Magic Fairy”) – media chain (Jia Jia Cartoon) – toy chain (gyro, etc. series products and channel network) – baby chain (“AUBY”, “LUCKY UNION”, etc. brands and channel network), which is being consistently strengthened through foreign cooperation, investment, mergers and acquisitions.

October 11, 2012, Alpha Animation signed an official agreement with Hasbro in Shanghai. The two sides establish a long-term strategic partnership and co-invest US\$15 million to set up joint venture, in a bid to develop and design cartoon toys and related derivative products, distribute products and launch brand licensing on a global scale.

Global and China Animation Industry Report, 2012-2015 mainly covers the followings:

- Development of global animation industry, including development model and profit model of major global animation industry bases e.g. the United States and Japan’s animation industry;
- Overview of the Chinese animation industry, covering policy support, market size, business type, development status and future trends;
- Animation derivative industries in China, involving cartoon toys, anime apparel, theme parks, etc.;
- 7 multinational companies and 14 Chinese animation companies.

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