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

In recent years, a series of favorable policies issued by the Chinese government in finance, intellectual property protection and culture industries stimulate the rapid expansion of Chinese TV drama market.

In 2012, 612 TV dramas were launched in China, rising by 50 ones year on year; 19,659 episodes were issued, representing a year-on-year increase of 2,941 ones. Meanwhile, 506 TV dramas made in China (accounting for 82.68%) were published, up 37 ones year on year; 17,703 episodes were released, with a year-on-year growth of 18.48%. The length of each TV drama made in China ascended from 27.58 episodes in 2006 to 34.99 episodes in 2012 averagely.

In 2012, the transaction value of TV dramas made in China jumped by 44.74% year on year to RMB11 billion, of which RMB8 billion sourced from broadcast copyright trading and RMB3 billion from network copyright trading. In 2011-2012, the transaction value increased significantly mainly because of the growing number of higher-priced classic dramas.
By H1 2013, there had been seven Chinese listed companies engaged in television production and distribution. In 2008-2012, their TV drama revenue grew at over 30%; by the CAGR of TV drama revenue, New Culture (88.67%), Enlight Media (81.63%) and Huace (61.26%) ranked the top three.

In 2012, five ones of these seven listed companies gained the gross margin of 40% or more. In point of gross margin, the top three companies were Huayi Brothers (56.02%), Huace (55.74%) and Hualu Baina (44.90%).

In the future, with the increase of Chinese TV drama platforms, the demand for high-quality dramas will go up, and the value of such dramas will rise. Prominent dramas will be the focal point that all platforms compete for.

The report consists of the following aspects:

※ Overview of China TV drama Industry (including industrial chain, business models, profit models, relevant policies, television channels, TV advertising industry, online video industry, etc.)
※ Chinese TV drama market (including status quo, supply and demand, revenue, export, prospect, etc.)
※ Chinese TV drama production, distribution and broadcast markets (including status quo, competitive patterns, comparison between listed companies, TV stations, network broadcasting, etc.)
※ The market of introduced TV dramas by China (including policies, status quo, competitive patterns, etc.)
※ Operating performance, revenue structure, gross margin, TV drama business, competitive advantages, development strategies and prospect of major Chinese TV drama producers (including Huace, Huayi Brothers, HaiRun, etc.)
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