



**Global and China Animation Industry  
Report, 2014**

**Jun. 2014**

## 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

China's animation industry output value continued to grow and exceeded RMB90 billion in 2013, showing a year-on-year increase of around 21.0%. Despite the overall sustained growth, each link of the industrial chain is developing to varying degrees.

From the production and broadcast market, China's animation production suffered three consecutive years of decline (2011-2013). In 2013 China produced 358 domestic TV cartoons, a total of 204,732 minutes long, respectively down 9.37% and 8.17% year on year, mainly because it was difficult for government subsidiaries to cover the increasingly higher costs of production. In addition, the original IP resource scarcity has been a tough and unbreakable bottleneck for domestic animation.

As another major play position for animation, the Chinese animation film market has shown a rising trend in both quantity and price since 2011. In 2013, there were a total of 33 animation films released

in Chinese mainland theatres, including 24 homemade and 9 imported, generating total box office of about RMB1.64 billion, up 13.34% year on year.

With respect to the animation derivatives market, in 2013 the domestic market size approximated RMB26.4 billion, up 20% year on year. As the core of China's animation industry chain, the derivatives market has encountered stormy mergers and acquisitions since 2013, thus constantly improving and extending the animation industry chain. Representative firms are Guangdong Alpha Animation and Culture Co., Ltd. (Alpha Animation), Huawei Technology Co., Ltd and Meisheng Culture & Creative Corp., Ltd.

Of which, Alpha Animation as the leader with a complete animation industry chain has continuously extended its industrial chain through the layout of online game and mobile game since 2013. In the first quarter of 2014, it gained revenue of RMB375 million (up 18.15% YoY) and net income of RMB49.8 million (up 10.28% YoY).

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The toy export-oriented Huawei Technology Co., Ltd. suffered a sharp decline of 25.64% in net income in 2013, affected by the export market downturn. The performance got improved by acquiring 20% stake in ebogame in December 2012. In the first quarter of 2014, its revenue and net income climbed 10.28% and 0.82% year on year to RMB60.1 million and RMB3.6 million, respectively.

Meisheng Culture & Creative Corp., Ltd., has focusing on anime apparel, but seeing frequent mergers and acquisitions since its listing in 2013, thus realizing the full cut-through from content (Zhejiang Dishun Technology Co., Ltd.), media (DreamFactory + The Age of Innocence) to derivatives sales (the Dutch distributor). In the first quarter of 2014, its revenue and net income saw substantial increases of 218.76% and 37.36% to RMB50.7 million and RMB4 million, respectively.

Global and China Animation Industry Report, 2014 by ResearchInChina mainly covers the followings:

- ✘ Overview of global animation industry, mainly involving supportive policies, industrial pattern, as well as development model and profit model of U.S. and Japanese animation industries;
- ✘ Overview of Chinese animation industry, including supportive policies, output value, company type, competition patter, etc.;
- ✘ Chinese animation production and distribution markets, mainly aimed at television animation, animation film, cartoon game, caricature, new media market and animation industry base;
- ✘ Chinese animation derivatives industries, involving cartoon toys, anime apparel, theme park, etc.;
- ✘ Operation, anime works, business model, development strategy, performance forecast of eight transnational companies and 13 Chinese animation companies.

## Acquisition Cases in China Animation Derivatives Market, 2013-2014

Time	Acquisition Events
Jul-13	Meisheng Culture & Creative Corp., Ltd. acquired 51% stake in the original animation and animation derivatives developer – Zhejiang Dishun Technology Co., Ltd.
Sep-13	Alpha Animation participated in the mobile game developer – Lakoo Limited as well as the mobile card game developer – Shanghai Hilink Entertainment Network Co., Ltd.
Oct-13	Alpha Animation purchased 5agame and 51pocket at the price of nearly RMB700 million.
Oct-13	Meisheng Culture & Creative acquired 85% stake in the Dutch distributor – Agenturen en Handelsmij Scheepers B.V.
Dec-13	Huawei Technology bought 20% stake in the mobile game developer – ebogame
Jan-14	Alpha Animation increased RMB30 million to hold 60% stake in yesgames.
Mar-14	Meisheng Culture & Creative reacquired 34.82% stake in Zhejiang Dishun Technology Co., Ltd.
Apr-14	Alpha Animation acquired 40% stake in online game companies – Sanle and Dreamspace each
Apr-14	Meisheng Culture & Creative acquired 51.06 stake in the stage play production and performance company – DreamFactory
May-14	Meisheng Culture & Creative acquired 70% stake in the film & television production and distribution company – The Age of Innocence

Source: Company Information, ResearchInChina

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