



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

Nov. 2015

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

Chinese animation industry has maintained the momentum of robust growth from 2014 on, thanks to the government's supportive policies on animation industry and booming Internet-based new media distribution channels. In 2014, the total output value of China's animation industry exceeded RMB100 billion, up 14.84% from a year earlier.

The animation industry of China characterizes the following during 2014-2015:

The production of animation declined, but box-office earnings of animated movies kept going up. In 2014, China produced 138,579 minutes of domestic TV cartoons, down 32.31% year on year, the lowest level since 2009 and only half of the peak in 2011. There are two main reasons: 1) Fierce market competition resulted in slim profits for some animation firms to stay afloat. 2) Proposal for animation production transiting from quantity to quality put forward in the 12th Five-Year Plan (2011-2015) promoted local authorities to optimize their support schemes.

In 2014, a total of 45 animated movies were released in Chinese mainland theatres, generating total box office of nearly RMB3 billion, including about RMB1.9 billion contributed by 17 imported animated movies and RMB1.06 billion by 28 domestic ones.

The rise and prosperity of new media channels represented by mobile Internet and smart TV fueled the development of animation industry. The influence of Internet on the animation industry is reflected in the following three aspects: 1) New media channels are more demanding on the segmentation of animation content. Video websites have special column for animations. 2) Animation is endowed with the property of being social to meet people's social needs, such as "barrage", animation fairs, and animation communities. 3) New media provides demand for animation derivatives like games on desktop and mobile devices.

Take U17.com (a premier platform for original comics and animations) for example, its animated short "One Hundred Thousand Bad Jokes" was broadcast for hundreds of millions of times, and the movie of the same name released in early 2015 recorded a box office of RMB118 million.

Derivatives market size continued to expand. In 2014, the Chinese animation derivatives market scale grew by 19.7% year on year to RMB31.6 billion, or 31.6% of the entire animation industry (with a growth rate of 14.8%). Animation toys hold the highest proportion, more than half of the whole Chinese animation derivatives market size, followed by animation apparel and animation publishing with a share of 16% and 4%, respectively.

Major listed animation companies continuously extended industry chain with the aim of making a business presence throughout the whole industry via M&As.

M&As in the Chinese Animation Market, 2013-2015

Time	Acquisition
July/13	Meisheng Cultural & Creative acquired a 51% stake in Zhejiang Dishun Technology, a developer of original cartoons and animation derivatives
September/13	Guangdong Alpha Animation and Culture bought shares in Lakoo Limited, a developer of mobile games, and Shanghai Hilink Entertainment Network, a developer of mobile card games.
October/13	Guangdong Alpha Animation and Culture acquired 5agame and 51Pocket for nearly RMB700 million.
October/13	Meisheng Cultural & Creative acquired a 85% stake in Dutch distributor Agenturen en HandelsmijScheepers B.V.
December/13	Huawei Technology acquired a 20% stake in Shenzhen Diyibo Net Technology, a developer of mobile games.
January/14	Guangdong Alpha Animation and Culture made a capital increase of RMB30 million to raise its share in Yesgames to 60%.
March/14	Meisheng Cultural & Creative again acquired a 34.82% stake in Zhejiang Dishun Technology.
April/14	Guangdong Alpha Animation and Culture acquired a 40% stake in online game companies Guangzhou Sanle Information Technology and Dreamspace respectively.
April/14	Meisheng Cultural & Creative acquired a 51.06% stake in Hangzhou Dream Star Factory, a stage play production and performance company.
May/14	Meisheng Cultural & Creative acquired a 70% stake in Shanghai Age of Innocence, a film & TV production and distribution company.
July/14	Huawei Technology acquired the remaining 80% stake in Shenzhen Diyibo Net Technology for RMB806 million.
June/15	Huawei Technology acquired a 100% stake in Zhejiang Dream Stardom Film and TV Culture for RMB1.2 billion.
July/15	Meisheng Cultural & Creative spent about RMB45 million to acquire about a 36% stake in Shanghai Yingqi Animation Technology.
August/15	Guangdong Alpha Animation and Culture acquired a 100% stake in Beijing April Star Network Technology for RMB904 million.

Source: Above-mentioned Companies, ResearchInChina

Global and China Animation Industry Report, 2015 highlights the followings:

- Overview of global animation industry, mainly involving support policies, industrial pattern, as well as development model and profit model of U.S., Japanese and South Korean animation industries;
- Overview of China's animation industry, including support policies, output value, type of company, competitive landscape, etc.
- Analysis of the Chinese animation production and distribution markets, covering mainly TV animation, animated film, animation game, cartoon, new media market and animation industrial base;
- Analysis of China's animation derivatives industries, involving cartoon toys, animation apparel, theme park, etc.;
- Operation, anime works, business model, development strategy, performance forecast of 8 multinational companies and 9 Chinese animation companies.

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