



**Global and China Animation Industry
Report, 2017-2021**

Apr.2017

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 2016, the global animation industry recorded output value of approximately USD220 billion, of which, the United States made the greatest contribution and claimed about 38% market share, with animated blockbusters boosting the development of the whole industry chain; Japan gained roughly 10% share but a large number of products – about 60% of the world's animation works come from Japan. China's animation industry started relatively late, still lagging behind the United States, Japan and other developed countries. In 2016, China's animation industry output value reached around RMB130 billion (with a global share of 8% or so), up 15.0% year on year. In the future, with the increasingly significant animation intellectual property (IP) operations and continuous permeation of animated films, output value of animation industry will keep expanding, with an expected RMB150 billion in 2017 and more than RMB230 billion in 2021.

The Chinese animation industry has seen steady growth since 2015, with market characterizing the following:

1. The Improving Quality of Works

In 2015, 'Monkey King: Hero Is Back' gained the box office of nearly RMB1 billion and became the highest-grossing animated film in the history of Chinese film. In 2016, Big Fish & Begonia recorded more than RMB500 million at the box office, and the Sino-foreign co-produced Kung Fu Panda 3 exceeded RMB1 billion.

2. Film Animation and New Media Animation Become Hot Spots

In 2016, China approved 182 animated films, completed 60 ones and released 39 ones, with cumulative box office returns of RMB2.35 billion, up 15.2% year on year, accounting for 34.1% of China's animation film market revenue.

In addition, online comics are growing fast, e.g. the comic platform u17.com has gathered 14,000 grassroots comic authors or groups and published over 40,000 online comics as of 2016.

3. Investment and Financing Market is Active

In 2016, 15 anime startups obtained financing. They are mainly companies that integrate animation production, IP derivatization, etc., represented by Fireworks Culture, Canwell and JoyWorks. Among them, Fireworks Culture got RMB40 million financing from Jiangsu Xiuqiang Glasswork Co., Ltd., Shanghai Delight Capital Management Co., Ltd. and other companies.

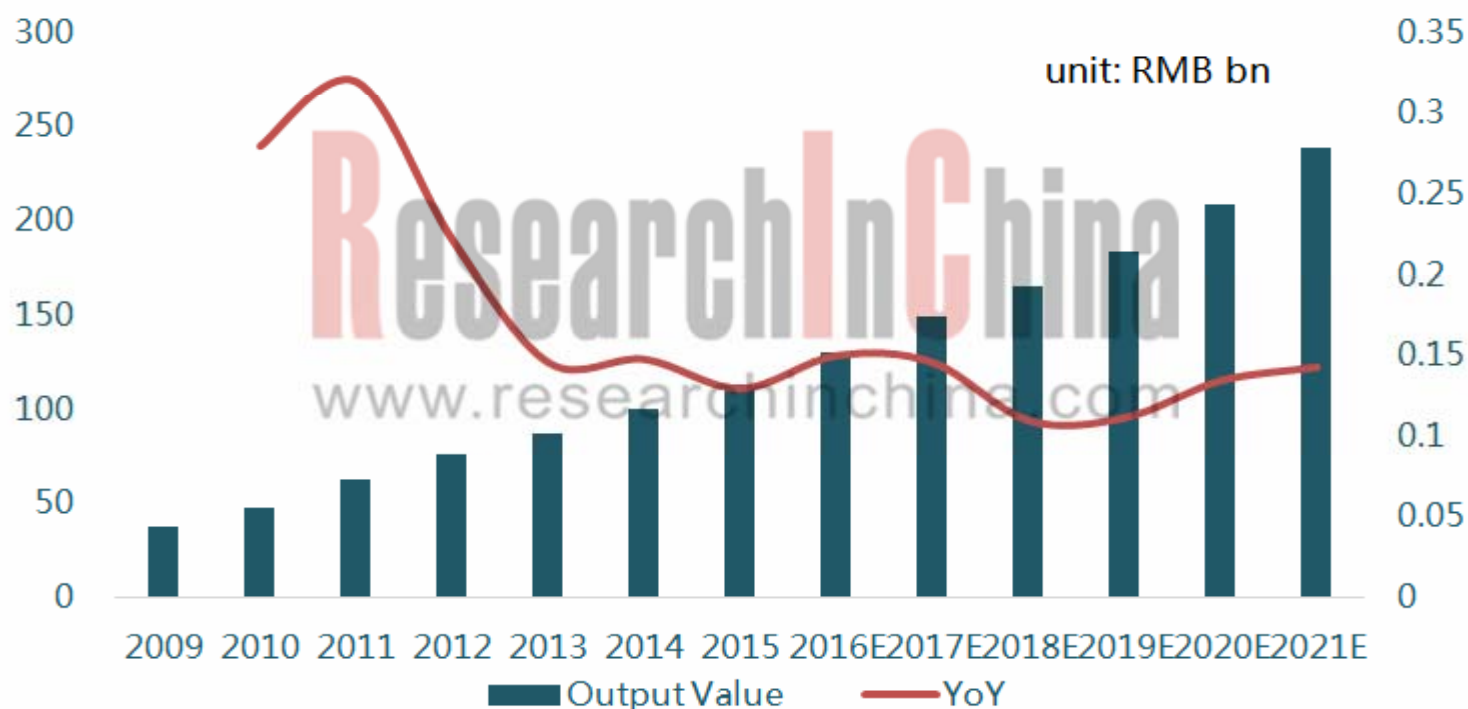
4. Sino-foreign Cooperation Deepens

Chinese animation enterprises have established increasing cooperation with foreign peers since 2015. In 2015, Enlight Media and Japan's Access Bright set up a joint venture on co-development of popular animation film and television works; LeTV and the director of The Lion King developed The Wolf Totem animated film. In 2016, Oriental DreamWorks and DreamWorks Animation together shot Kung Fu Panda 3. In 2017, Sina Comic and the France-based Delitoon co-published Go Away Mr Tumour (French version) cartoon.

The report highlights the following:

- ◆ Definition, industry chain, business model, development characteristics, etc. of animation industry;
- ◆ Animation industry policy, industry status, scale, etc. of global and segmented markets (USA, Japan, Korea);
- ◆ Development environment, market size, competition pattern, industrial base, etc. of China's animation industry;
- ◆ Scale, structure, trends, etc. of China's animation production, communication and distribution markets (TV animation, animated film, anime games, new media animation);
- ◆ Scale, pattern, etc. of China's derivatives market (animation toys, animation clothing, theme park, brand licensing);
- ◆ Operation, development strategy, etc. of 8 foreign and 10 Chinese animation related enterprises.

Output Value and YoY Growth of China Animation Industry, 2009-2021E



Source: Global and China Animation Industry Report, 2017-2021 by ResearchInChina

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