

Global and China Animation Industry Report, 2019-2025

June 2019

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

Up to date, the global animation market is still firmly dominated by the United States and Japan, followed by South Korea that springs up. The global animation output value approximates USD250 billion, and records as much as USD500 billion or so if peripheral products are taken into account. The Japanese animation market was worth over JPY2 trillion for the first time in 2017, thanks to the foreign animation boom and business diversification. South Korea's animation sales in 2017 was estimated to be KRW1 trillion (about RMB6 billion), of which KRW724 billion (about RMB4.3 billion) might come from online animation whose market size is expected to report KRW1 trillion by 2020.

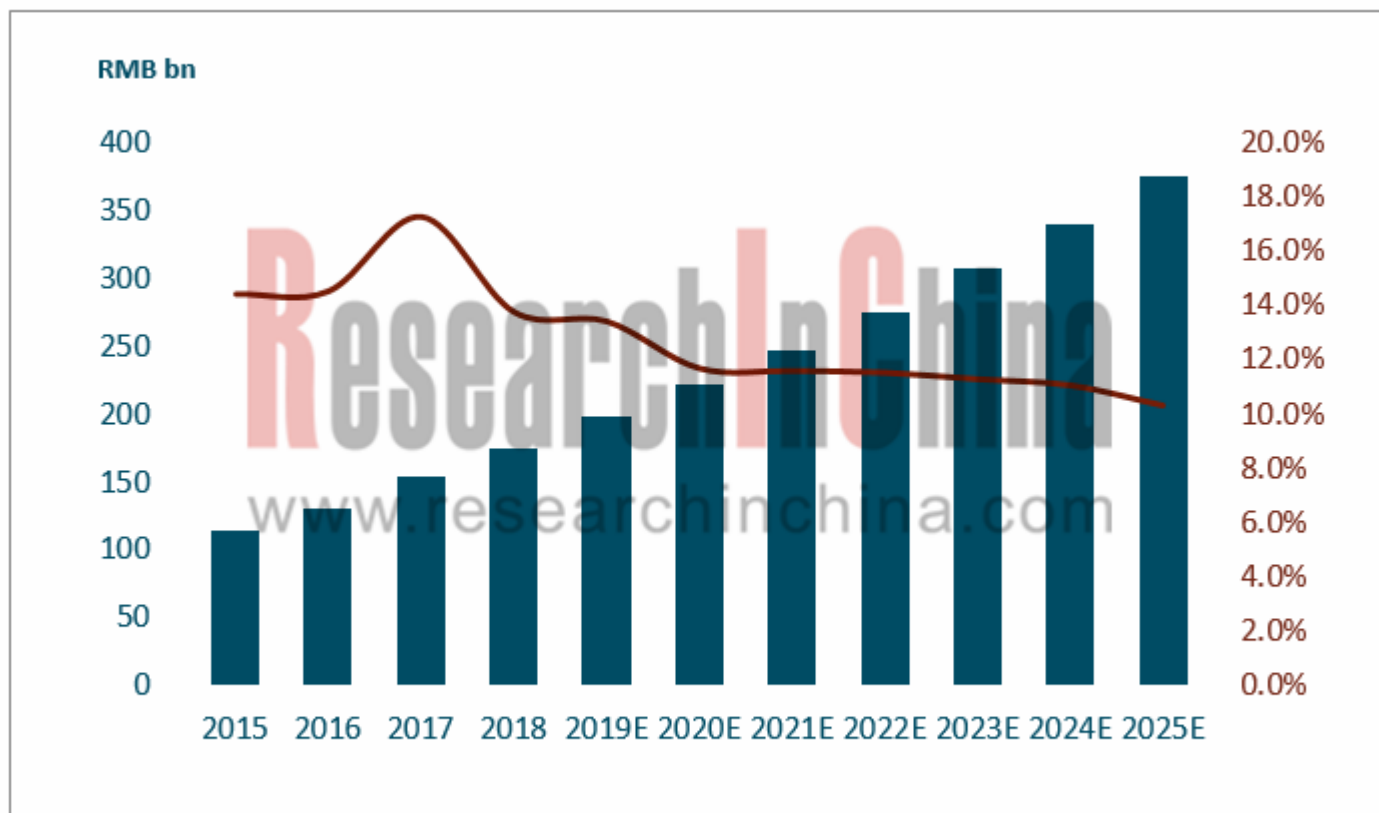
China's animation industry has been progressing apace over the recent years, with its output value surging from RMB88.2 billion in 2013 to RMB174.7 billion in 2018 and expectedly outnumbering RMB200 billion in 2019 and standing at RMB375 billion by 2025.

The output value of animation is largely contributed by the upstream content market and the downstream derivative market, of which the market of derivatives hit about RMB76.4 billion in 2017, doubling that of the former. In Japan, the market size of derivatives is generally 8-10 times that of the broadcast market, indicating great growth potentiality of Chinese animation derivative market.

Users' habit of paying for animation content is still being cultivated. In 2018, paid works accounted for 22% of the top 50 animation works on air by view. Joint broadcast and exclusive broadcast of premium content shared the paid head content, 71% of which was covered by iQIYI that performed well in the animation payment field. In the future, animation will be integrated into the paid content along with dramas and movies.

With the better living standards of adolescents and the widespread ACG (anime, comics and games) culture in China, there is an enormous number of pan-ACG users in China, hitting nearly 350 million in 2018 (including more than 200 million online animation users). The huge user base triggers huge demand for animations.

Output Value and Growth Rate of China's Animation Industry, 2015-2025E



Source: Global and China Animation Industry Report, 2019-2025 by ResearchInChina

The animation industry has always been a hot spot for investment, but it is primarily dominated by strategic investors including platform giants (such as Tencent, iQiyi, NetEase and Bilibili) as well as film and television companies (mainly Enlight Media and Wanda Media). Among them, Bilibili and Tencent have become important players in the animation investment, and they have invested in a number of companies with IP capacity or animation production capabilities.

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, South Korea);
- Development environment, market size, competition pattern, industrial base, etc. of China's animation industry;
- China's animation industry chain, upstream, midstream and downstream enterprises, and user preference survey data;
- Scale, structure, trends, etc. of China's animation production 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.

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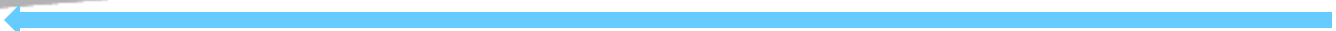
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