

# Anime Industry Report 2016

## Summary

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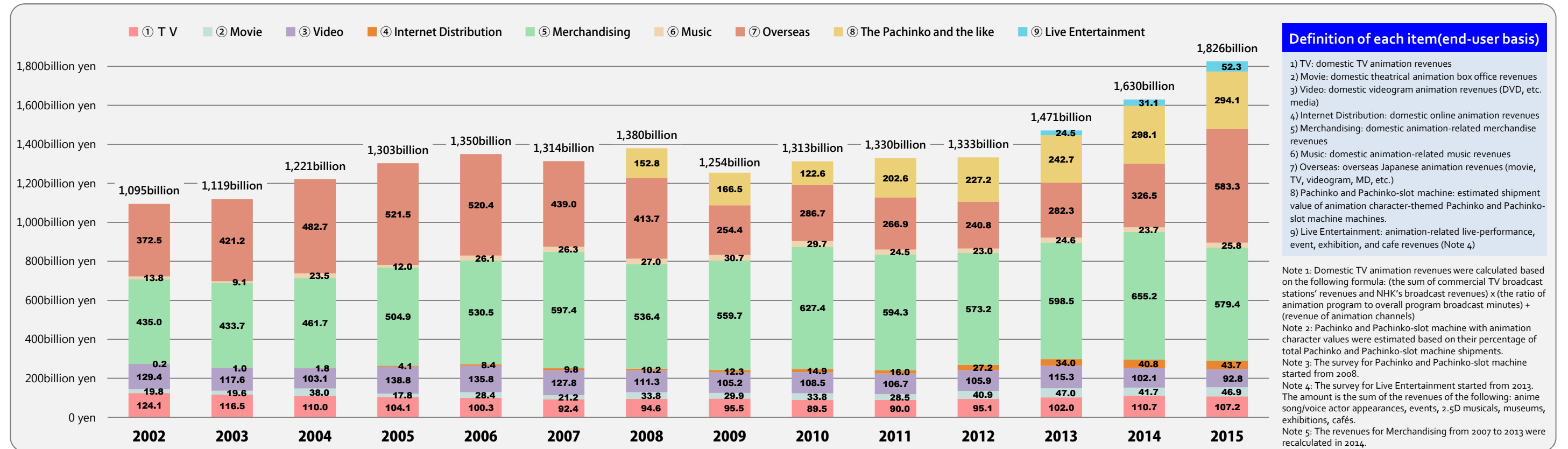
March, 2016

The Association of Japanese Animations

# Trends in Japanese Animation Market (2016 version)

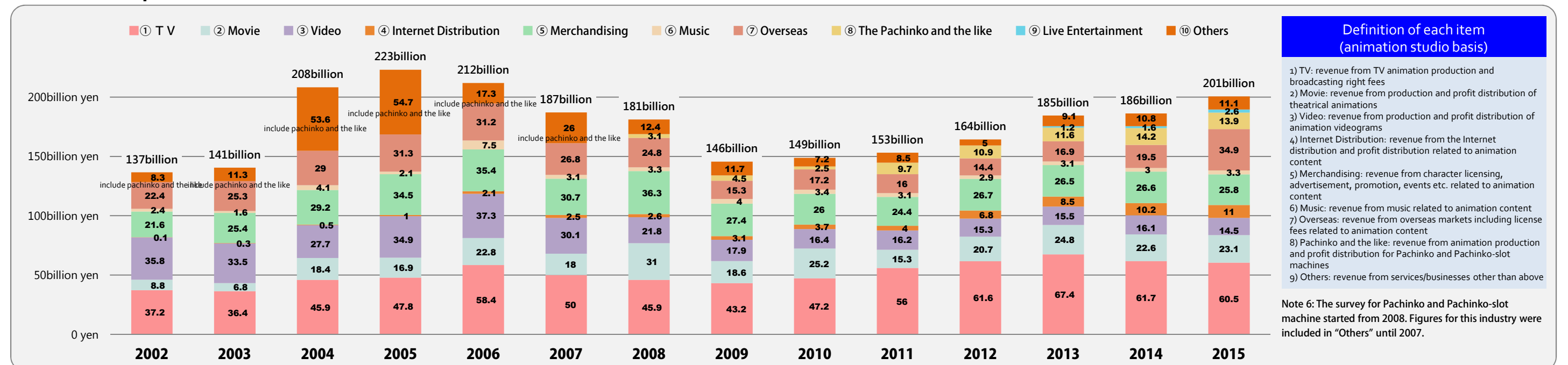
The upper part shows Japanese animation market trends in a broad sense (i.e. market size based on estimated revenues in animation and animation-related product markets). The lower part shows Japanese animation market trends in a more limited sense (i.e. market size based on the estimated revenues of all domestic commercial animation studios). It's obvious that the animation market in a broad sense is overwhelmingly larger than in a limited sense. This is because the animation-related businesses including character merchandising have significant leverage effects.

## Japanese animation market trends in a broad sense (i.e. market size based on estimated revenues in animation and animation-related markets) (2002 – 2015)



Based on questionnaires conducted by the Association of Japanese Animations and other publicly available statistics

## Trends in Japanese animation market in a limited sense (i.e. market size based on the estimated revenues of all domestic commercial animation studios) (2002 – 2015)



Based on questionnaires conducted by the Association of Japanese Animations and statistics released to public.

# Japanese Animation industry expands continuously, recording positive growth for 6 consecutive years and the highest revenues for 3 consecutive years

The Japanese animation industry, which hit bottom in 2009, has expanded since 2010, recording positive growth for six consecutive years, and the highest revenues for three consecutive years. Videogram (90.9%) and Merchandising (88.4%) revenues shrunk considerably, and TV (96.8%) and Pachinko (98.7%) revenues decreased slightly. On the other hand, Movie (112.0%), Music (108.9%) and Internet distribution (107.1%) enjoyed strong revenues, and Live Entertainment (168.4%) and Overseas (178.7%) also made important strides.

## The 4th Anime Boom has arrived?

It can be said that Japanese animation industry is now enjoying the 4th anime boom. The market, significantly exceeding the peak in the 3rd Anime Boom (mid in 2000's), recorded positive growth for six consecutive years and the highest revenues for three consecutive years. However, there are no representative animation works leading the boom (works such as Astro Boy, Yamato, Eva, Pocket Monster, and Princes Mononoke which led previous booms). Probably "Your Name" would be recognized as the leading work in recent years; however, the market itself already recorded record revenues even before the arrival of this work. As specified in the report, this boom is attributed to increases in market channels, including Internet distribution, Pachinko and Pachinko-slot and Live Entertainment, over the past decade.

## Topics in Japanese animation Industry from 2015 to 2016

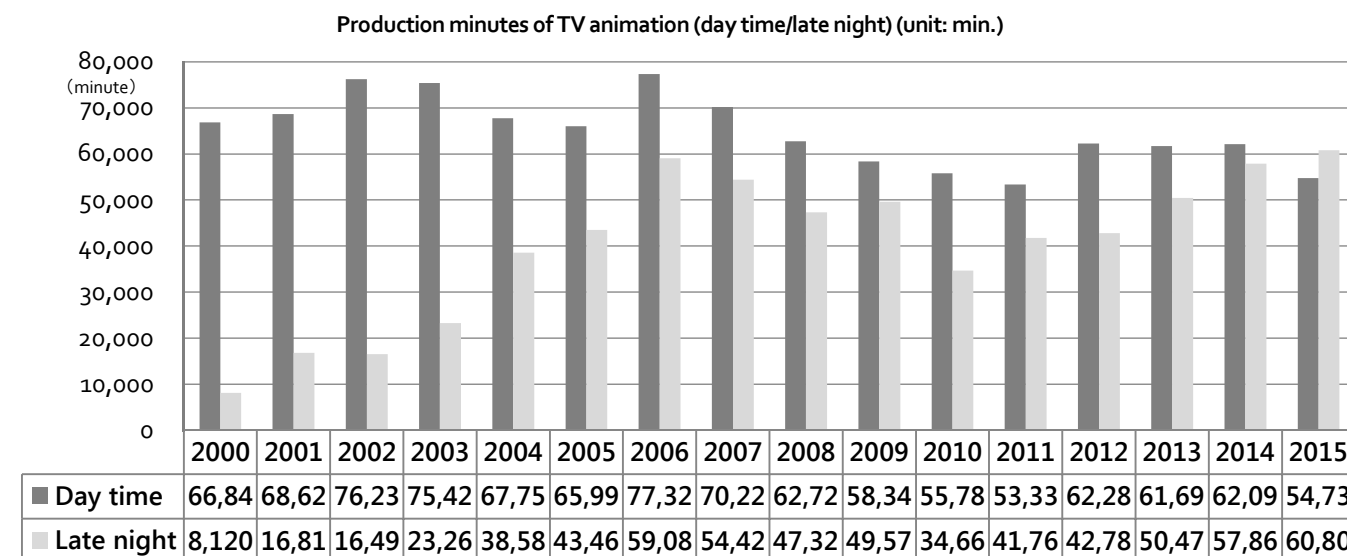
### 〈Late-night anime overtakes kids/family anime〉

Late-night anime era has come. The total production minutes of late-night animation programs firstly exceeded those of kid/family animation programs in Japan. Needless to say, this was also the first case in the world where animation was yet recognized as the entertainment only for kids. Japanese animation which disproved such accepted myth is indeed a symbolic icon of "Cool Japan".

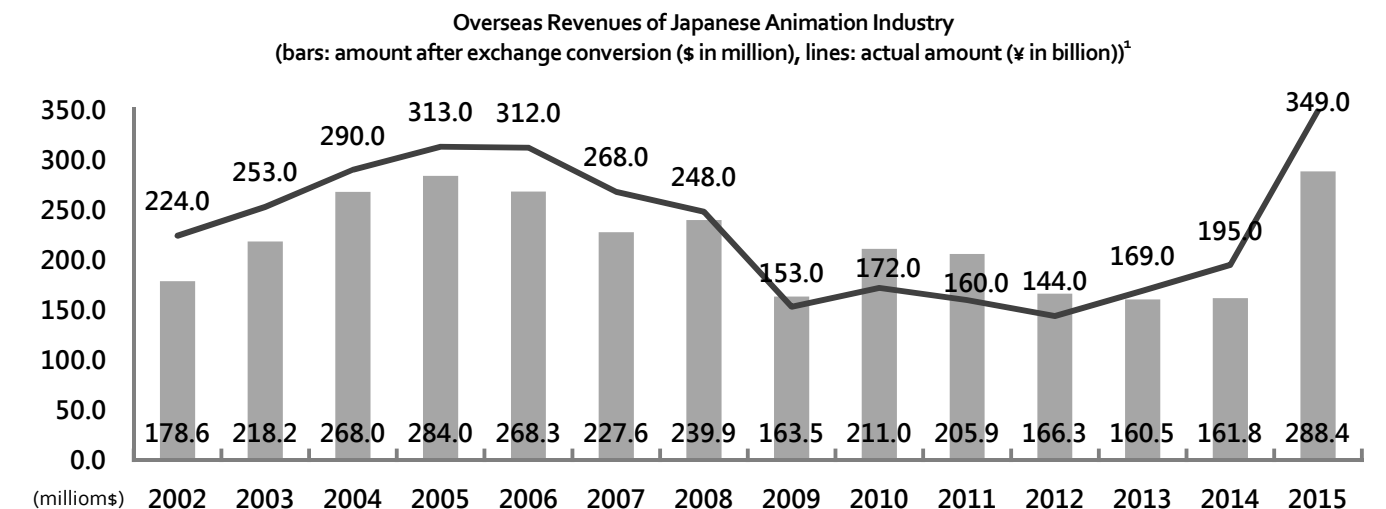
This turnover also suggests the direction of global animation in future. Japan holds a prominent position both in production and marketing in the field of adult animations. As explained in Overseas Trends in the report, "not only kid's animation works but also teen's and family animation works are increasing" outside Japan. However, Japan has a virtual monopoly in the field of adult animations produced only in Japan, which is so-called "Blue Ocean" situation, and the industry should recognize the potential of such adult animations in global markets especially with the emergence of new business models in which the Internet is key. At any rate, it's time that our recognition for adult animations should be changed. It's not a minor market but the business model that Japan leads ahead of others and has the potential to penetrate global markets.

### 〈Significant Revenue Increases in Overseas Market〉

In 2015, the number of contracts quadrupled and revenues increased significantly in the category of Overseas. Indeed, "Japanese animation industry proactively started engaging in overseas markets last year" as specified in Overseas Trends in the report. The export values which remained hardly changed for past three years suddenly increased, jumping from 19.5 billion yen to 34.9 billion yen, and recorded the highest, exceeding 31.3 billion yen in 2005. The major factor of this increase is attributed to "shopping sprees" by China. Despite revenue increases in North America and Asia countries, the remarkable increase in Chinese market constitutes more than half of the increase. It seems the trend



Calculated by the Association of Japanese Animations based on publicly available information/data (ex: Perfect Data)



Based on a survey conducted by the Association of Japanese Animations

<sup>1</sup> Annual average by Principal Global Indicators was used for exchange values

simmering beneath in the past few years burst to the surface in 2015, which was also seen in the answers by animation studios for open-questions as described in “Market Outline” in the report. Of course, Japanese animation industry welcomes the situation; however, it is undeniable this trend could be another bubble. Especially in China, all the industries, including cultural industries, are subordinate to the politics and bombarded with social situation of the moment. Not to mention of the Cultural Revolution, there have been several events affecting the market so far, such as the demonstration against Senkaku Islands dispute and retaliation for Korean entertainment industry against THAAD deployment to Korea. Thus it is hard to consider the market shifts without any political intervention in China. If the 2006 law that prohibits the broadcast of foreign animation programs during the prime time is applied to the Internet distribution, the recent prosperity might well collapse.

#### <Major Breakthrough of Live Entertainment>

Live anime-related entertainment continued to make important breakthroughs. The market doubled in the past three years since 2013 when the survey started, and recorded revenues of 52.3 billion yen in 2015, increasing by 68.4 % over the previous year. This increase, which may partially be attributed to improved accuracy of surveying methods, was also significantly associated with the rapid growth of overall domestic live entertainment markets, especially the growth of music market (i.e. revenues of music concerts, stage performances, plays etc., including live entertainment related to animation). The market size, which was 333.4 billion yen in 2012, became 503 billion yen, increasing by 51% over the past three years.

At the same time, non-staged live entertainment, such as anime museums, anime exhibitions and anime cafés are also doing well. Although revenues of non-staged live entertainment fall far short of those of staged live entertainment, the field still makes constant progress. Animation is shifting from a thing to be watched to a thing to be experienced, and the non-staged live entertainment, which offers a feeling of belonging to consumers, will continue to expand.

The sales amount arising from merchandise sold on-site (i.e. concerts, events, museums and exhibitions) is not included in the values in this report. If such revenues are included, and in some cases such they exceed ticket revenues, the live entertainment market size may reach 10 billion yen or more..

#### <Arrival of Post Ghibli>

In light of the great impact on the animation industry, this report ventures to touch on the topic of “Your Name” though it should be treated in the next report under ordinary circumstances.

As of October 24, 2016, “Your Name”, addressed as the first animation work which brought a big social impact since “Spirited Away”, recorded 16.4 billion yen at box office. As of the 9th week from the release, the work, still maintaining strong momentum, had recorded 10 billion yen at box office. It is the first animation movie other than the works directed by Hayao Miyazaki, “The Wind Rises” (12.0 billion yen at box office), and “Ponyo” (15.5 billion yen at box office) to achieve this range. “Your Name” surprised the market not only as the first non-Miyazaki movie to exceed 10 billion at box office but also as a substantial leap from past works directed by Shinkai.

Director Shinkai did not achieve satisfactory results before “Your Name”. In terms of box office, “Kotonoha no Niwa” recorded 150 million yen, which was the maximum among his past four works, and other three works failed to merit mention. When “Princess Mononoke” exceeded 10.0 billion yen at the box office, the industry was not astonished since Miyazaki’s two previous works already topped the box office lists. In case of “Your Name”, however, people presumably wondered what made it such a great hit. Furthermore, it’s sure that the impact was amplified since Director Shinkai was unknown among non-anime fans and people outside the industry.

The momentum of the box office was also breathtaking. “Your Name” achieved 10.0 billion at box office only in 28 days while Princess Mononoke took four months to achieve the same result. This difference can be attributed to the spread of cinema complexes which determine their screening schedule flexibly. Still, the pace until the 5th week even exceeded that of “Frozen”, which recorded 25.48 billion at the box office in 2014.

Expectations were that establishment of a post-Ghibli era would take more time, but this hurdle was cleared quite easily. The arrival of “Your Name” not only silenced mass media criticism that “the next generation was not growing” but also showed the depth of the talent pool in the Japanese animation industry. This hit undoubtedly makes Director Shinkai feel tremendous pressure for his next work, but we would frankly like to just celebrate his success

Live Entertainment Market in 2015 (unit: ¥ in million)

| Item                      | 2013   | 2014   | 2015   | Over the Previous year | Outline  |
|---------------------------|--------|--------|--------|------------------------|--|
| 1 Stage/Event             | 10,788 | 12,875 | 25,092 | 194.9%                 | A sum of a and b   |
| a Anime song live concert | 6,888  | 8,565  | 14,784 | 172.6%                 | Ticket revenues for live concerts mainly featuring anime songs   |
| b Anime event             | 3,900  | 4,310  | 10,308 | 239.2%                 | Ticket revenues for events/stage performances mainly featuring animation   |
| 2 2.5D Musicals           | 8,698  | 9,428  | 10,395 | 110.3%                 | Ticket revenues for 2.5D musical (i.e. stage shows, plays, performances or the like based on animation, manga and games) |
| 3 Live Viewings           | 494    | 1,370  | 2,563  | 187.1%                 | Ticket revenues for live viewing events featuring anime songs, anime events and musicals                                 |
| 4 Anime Museum/Exhibition | 4,500  | 5,409  | 9,289  | 171.7%                 | Sum of C and D below   |
| c Anime Museum            | —      | 3,358  | 6,323  | 188.3%                 | Ticket revenues for anime museums  |
| d Anime Exhibition        | —      | 2,051  | 2,966  | 144.6%                 | Ticket revenues for exhibitions related to animation   |
| 6 Anime Café              | —      | 2,000  | 5,000  | 250.0%                 | Revenues of cafés and restaurants featuring animation  |
| Total                     | 24,480 | 31,082 | 52,339 | 168.4%                 |  |

1a and 2: based on the survey by PIA Research Institute  
Others: based on the survey by the Association of Japanese Associations

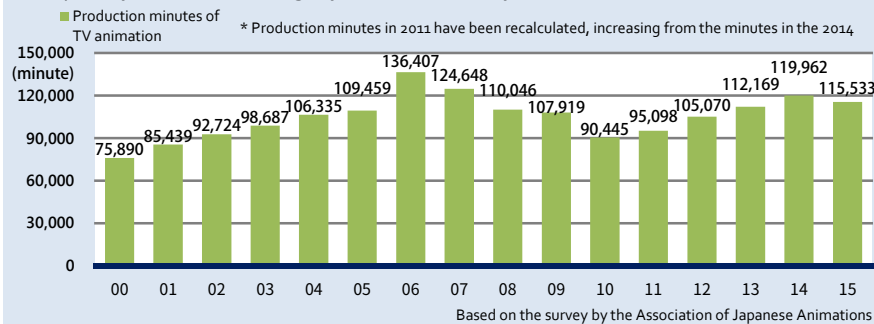
# Trends in Japanese Animation Market (2016 version)

## Strong earning in TV, Movie, Merchandising and Internet Distribution offsetting decreases in Video package revenues

### Production minutes of TV animation (2000-2015)

Production minutes declined slightly from the previous year. Capacity of TV animation production approaches its limit?

The total production minutes of TV animations in 2015 were 115,533 minutes, decreasing by 3.7% (4,429 min decrease) from the previous year when it recorded its 3rd highest. This indicates present TV animation production capacity in Japan (i.e. the capacity limit of animation drawing) is around 120,000 min. at maximum. Also the total production minutes of late-night animation programs firstly exceeded those of kid/family animation programs in day-time (i.e. 5:00 a.m. – 23:00 p.m.). This phenomenon reflected production minutes of new kids/family animations during day-time decreased by half from 22,278 min. to 11,248 min.

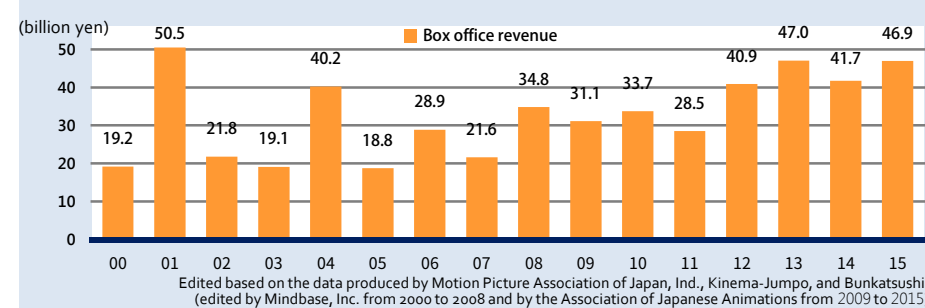


### Box office revenue of theatrical animations (2000-2015)

\* All theatrical animation movies released not only via ordinary distribution routes but also independently are included in this survey.

Steady shift thanks to the hit of Mamoru Hosoda's new film The Boy and the Beast and YO-KAI WATCH theatrical version

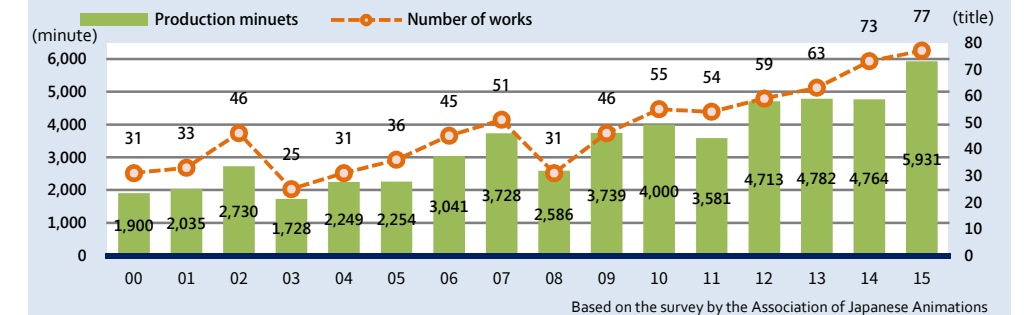
Since 2000, the total box office revenues have been greatly affected by Ghibli works which make exceptional box office revenues. The year 2015 was the first year Ghibli had no plan to release a new movie for some time to come, nevertheless, the total box office showed a steady growth, recording 46.7 billion yen. The main factor was the success of "The Boy and the Beast", the first film directed by Mamoru Hosoda in three years, and "The Movie: YO-KAI WATCH". Also some regular series such as "Detective Conan: Sunflower of Inferno" did well. In addition, "Love Live! The School Idol Movie" and "Girls and Panzer", both based on late-night animations, earned more than 2 billion yen at box office respectively by attracting fanatic fans visiting theaters repeatedly.



### Number of theatrical animation works and their production minutes (2000-2015)

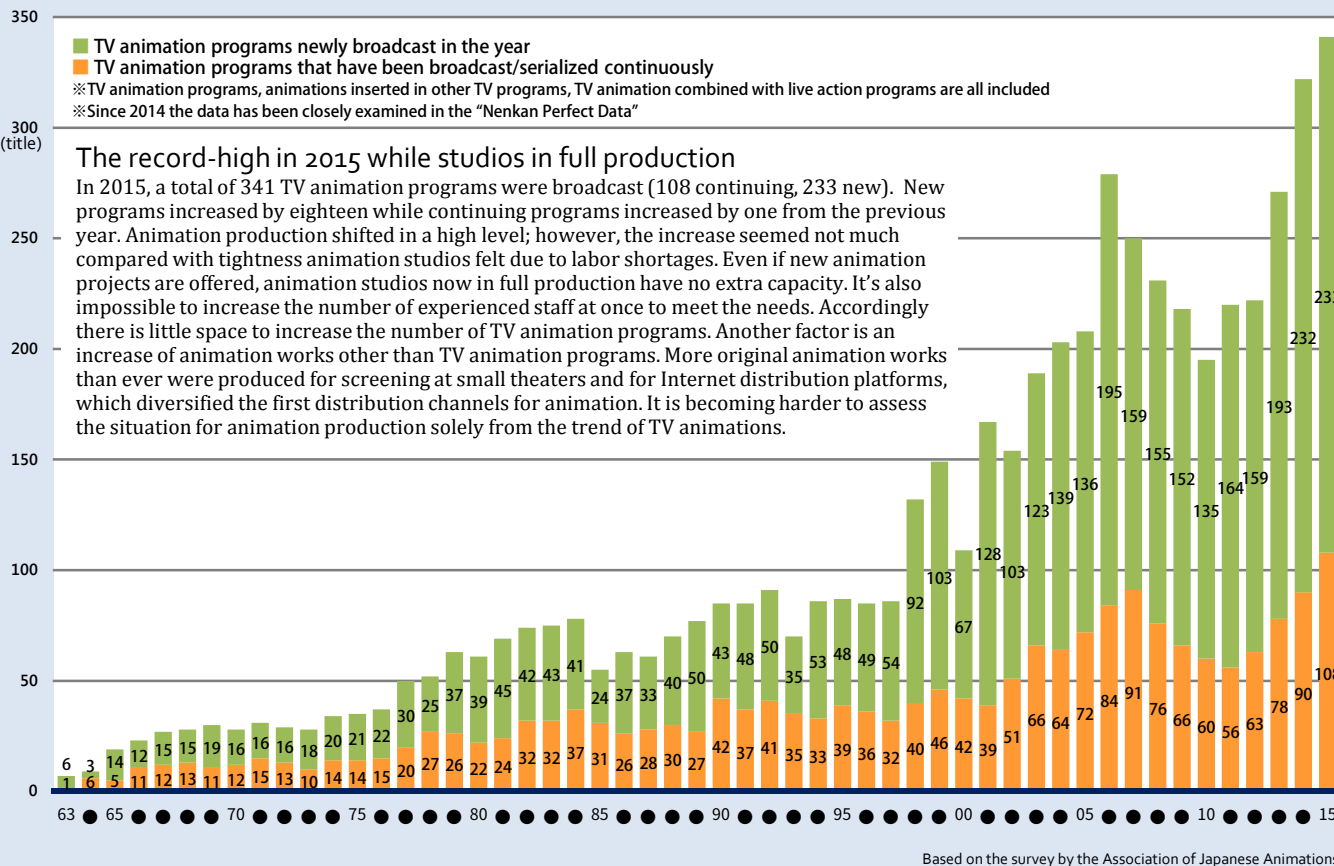
Theatrical animation works increasing due to digitalization

The number of theatrical animation works increased significantly from 73 to 85 (a 16% increase from 2014). Also the number of production minutes increased from 4764 min. to 6046 min. (a 27% increase from 2014). This trend indicates that the animation industry became more theatrical animations-based which, though risky, is in consideration of the stagnation of videogram businesses as secondary revenue. Another contributing factor was the digitalization of production and screening, which served to spur theatrical animation.



## Data & Topics of Japanese Animation Industry 2016

### Number of TV animation programs (1963-2015)



#### The record-high in 2015 while studios in full production

In 2015, a total of 341 TV animation programs were broadcast (108 continuing, 233 new). New programs increased by eighteen while continuing programs increased by one from the previous year. Animation production shifted in a high level; however, the increase seemed not much compared with tightness animation studios felt due to labor shortages. Even if new animation projects are offered, animation studios now in full production have no extra capacity. It's also impossible to increase the number of experienced staff at once to meet the needs. Accordingly there is little space to increase the number of TV animation programs. Another factor is an increase of animation works other than TV animation programs. More original animation works than ever were produced for screening at small theaters and for Internet distribution platforms, which diversified the first distribution channels for animation. It is becoming harder to assess the situation for animation production solely from the trend of TV animations.

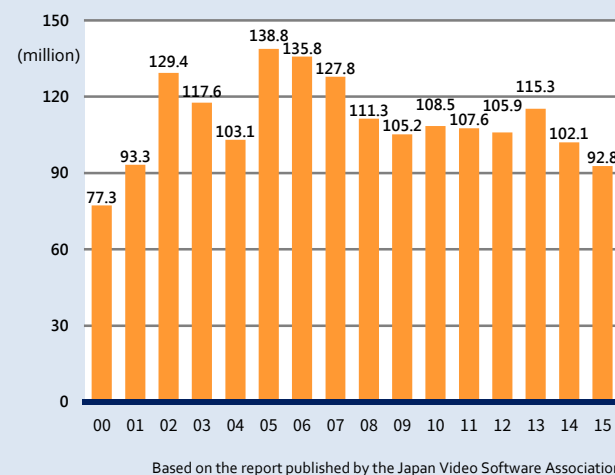
### Animation videograms (2000-2015)

#### Revenues of Animation Videograms

Revenues of animation videograms including from Japanese animation works both for adults and children (based on the report issued by Japan Video Software Association).

Animation videogram market shrunk due to popularization and digital consumption

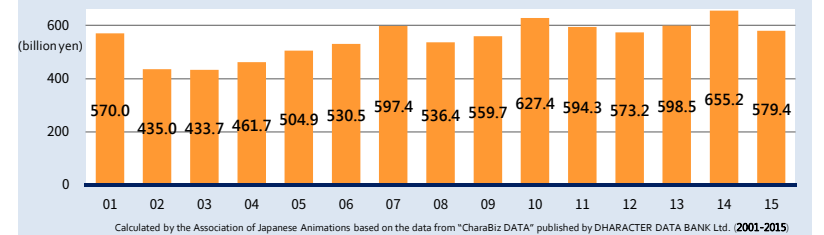
The size of animation videogram market in 2015 was 92.8 billion yen, decreasing by 9.1% from the previous year. So far the animation videogram market was stable thanks to anime fans purchasing video packages as collectables. However, anime users who thought the Internet distribution was fine enough or hoped to watch anime without spending much money increased while animation was popularized mainly among young people. Under today's social trend of digital consumption, the market shrinkage was unavoidable.



### Merchandising related to animations (2000-2015)

Revenues of the top 100 Japanese animation character sake rankings tallied. Revenues arising from the use of characters in advertisements, promotions and Pachinko and Pachinko-slot machines were not included in this survey. Totals from 2007 to 2013 were recalculated in 2014.

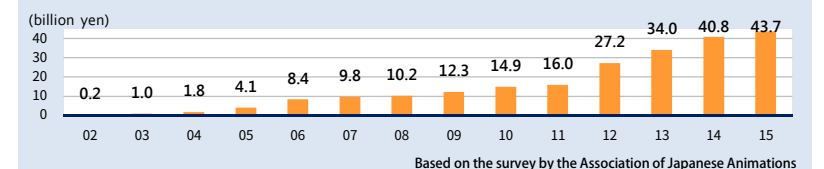
MD market shrunk due to push-back of YO-KAI WATCH while women's market got activated. Japanese merchandising market related to animation characters shrunk to 579.4 billion yen, which was 88.4% of the amount previously. This attributes to loss of YO-KAI WATCH boom in 2014 and slow recovery of some other standard animation characters, though such characters showed a sign of rebound. On the other hand, the market featuring characters targeting adult women such as Osomatsu-san and Sailor Moon did well. MD market where both classic and new characters compete against each other will have room for further growth.



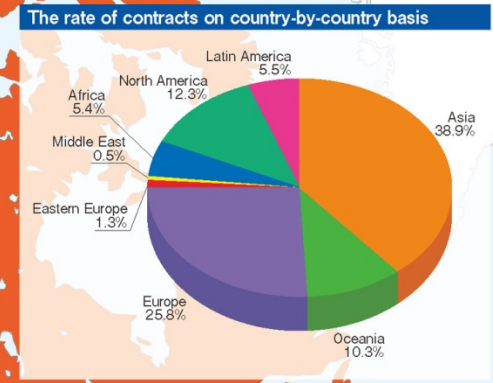
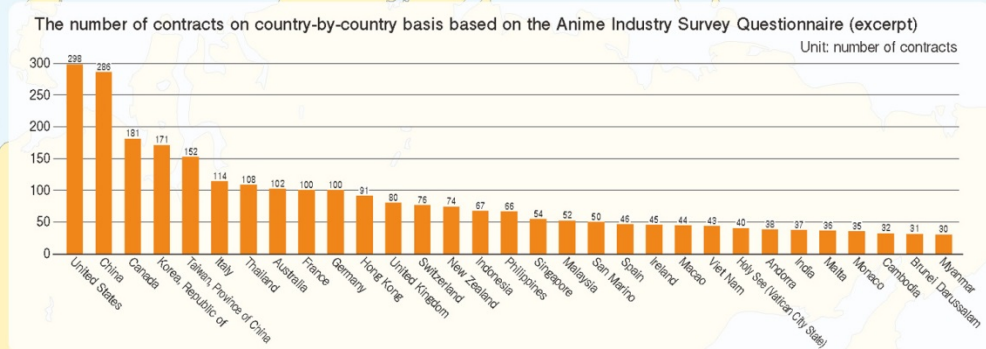
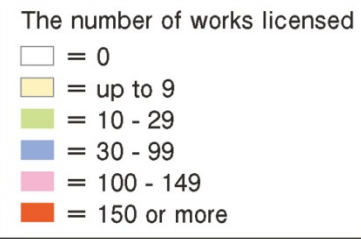
### Animation distribution via the Internet (2002-2015)

Growth of distribution slowed down while investment from overseas distribution increased sharply

In 2015, Japanese animation distribution market via the Internet was 43.7 billion yen, increasing by 7.1% over the previous year. Although the market rapidly expanded since 2012 thanks to full-scale dissemination of smart phones, it slowed down last year due to voluntary restraint of services and solicitation for paid contents by mobile carriers. On the other hand, investment by overseas platforms such as Netflix, Amazon and Chinese Internet distributors increased. It is likely the investments from overseas will exceed investment by domestic platforms in the near future. Probably the outline of the next business model will be revealed from 2015 to 2016.

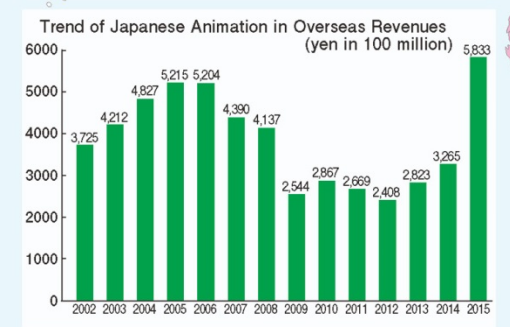


# Japanese Animation in Overseas Markets (2016 version)



## Overview of the Japanese animation industry overseas based on responses to the Anime Industry Survey questionnaire

In 2015, a total of 4345 contracts were made in overseas markets according to survey responses from 16 companies. This was the record-high and more than four times of the figure in 2014. Looking at the data by country, the United States came first (289) and China came in close second (286), followed by Canada, Korea and Taiwan. In terms of regions, the contracts made with Asian countries occupied almost 40 percent of the whole thanks to the remarkable increase of deals with China (mainly for the Internet distribution) as well as improvement of media environment in Thailand and Malaysia. 583.3 billion yen in revenues were recorded, an increase of 78.7% over the previous year. Thus the year 2015 became the first year Japanese animation industry started to approach to the global market proactively.



Top 10 animation works in overseas music royalties in the last 3 years

Based on the data by JASRAC

| Year | Rank | Work                                   |
|------|------|--|
| 2015 | 1    | KITERETSU DAIHYAKKA BACKGROUND MUSIC   |
|      | 2    | NINTAMARANTARO BACKGROUND MUSIC        |
|      | 3    | DRAGON BALL Z Background Music         |
|      | 4    | NARUTO SHIPPUDEN BACKGROUND MUSIC      |
|      | 5    | POKEMON BACKGROUND MUSIC               |
|      | 6    | Shin Jingi Naki Tatakai no Theme       |
|      | 7    | TANOSHII MOOIMIN IKKA BACKGROUND MUSIC |
|      | 8    | KAZE TACHINU BACKGROUND MUSIC          |
|      | 9    | INAZUMA ELEVEN BACKGROUND MUSIC        |
|      | 10   | BARBAPAPA SEKAIWO MAWARU               |
| 2014 | 1    | DRAGON BALL Z Background Music         |
|      | 2    | BLEACH Background Music                |
|      | 3    | BARBAPAPA SEKAIWO MAWARU               |
|      | 4    | POKEMON BACKGROUND MUSIC               |
|      | 5    | FAIRY TAIL BACKGROUND MUSIC            |
|      | 6    | NARUTO SHIPPUDEN BACKGROUND MUSIC      |
|      | 7    | SAINT SEIYA                            |
|      | 8    | Shin Jingi Naki Tatakai no Theme       |
|      | 9    | Red Cliff Background Music             |
|      | 10   | DRAGON BALL Background Music           |
| 2013 | 1    | NARUTO SHIPPUDEN BACKGROUND MUSIC      |
|      | 2    | ONE PIECE BACKGROUND                   |
|      | 3    | GTO BACKGROUND MUSIC                   |
|      | 4    | ONE PIECE BACKGROUND MUSIC             |
|      | 5    | SAILOR MOON BACKGROUND MUSIC           |
|      | 6    | INCREDIBLE ZORORI BACKGROUND MUSIC     |
|      | 7    | DRAGON BALL Z BACKGROUND MUSIC (TV)    |
|      | 8    | FAIRY TAIL BACKGROUND MUSIC            |
|      | 9    | HUNTER x HUNTER BACKGROUND MUSIC       |
|      | 10   | POKEMON BACKGROUND MUSIC               |

Number of contracts (by region/language)

| Area/Country              | Number of Contracts | Linguistic area                               | Number of Contracts |
|---------------------------|---------------------|---|---------------------|
| Entire world              | 56                  | Spanish                                       | 5                   |
| Europe                    | 47                  | Portuguese                                    | 0                   |
| Eastern Europe            | 0                   | Russian                                       | 0                   |
| Northern Europe           | 0                   | North Africa                                  | 3                   |
| Asia                      | 48                  | Scandinavia                                   | 1                   |
| South-east Asia           | 16                  | The Lesser Antilles                           | 3                   |
| South Asia                | 0                   | Antarctica                                    | 1                   |
| South America             | 9                   | Pan-Pacific                                   | 3                   |
| South and Central America | 34                  | Former Soviet nations                         | 2                   |
| Middle East               | 4                   | Former Yugoslavia nations                     | 2                   |
| Middle and Near East      | 2                   | Commonwealth of Independent States (CIS)      | 2                   |
| Oceania                   | 3                   | Contract for multiple works in multiple areas | 29                  |
| Africa                    | 7                   | Contract in a part of the territory           | 152                 |
| French                    | 41                  | Airplane                                      | 2                   |
| German                    | 64                  | Others  | 2                   |
| Italian                   | 22                  | Unknown                                       | 6                   |
| English                   | 26                  |   |                     |
|                           |                     | total   | 590                 |

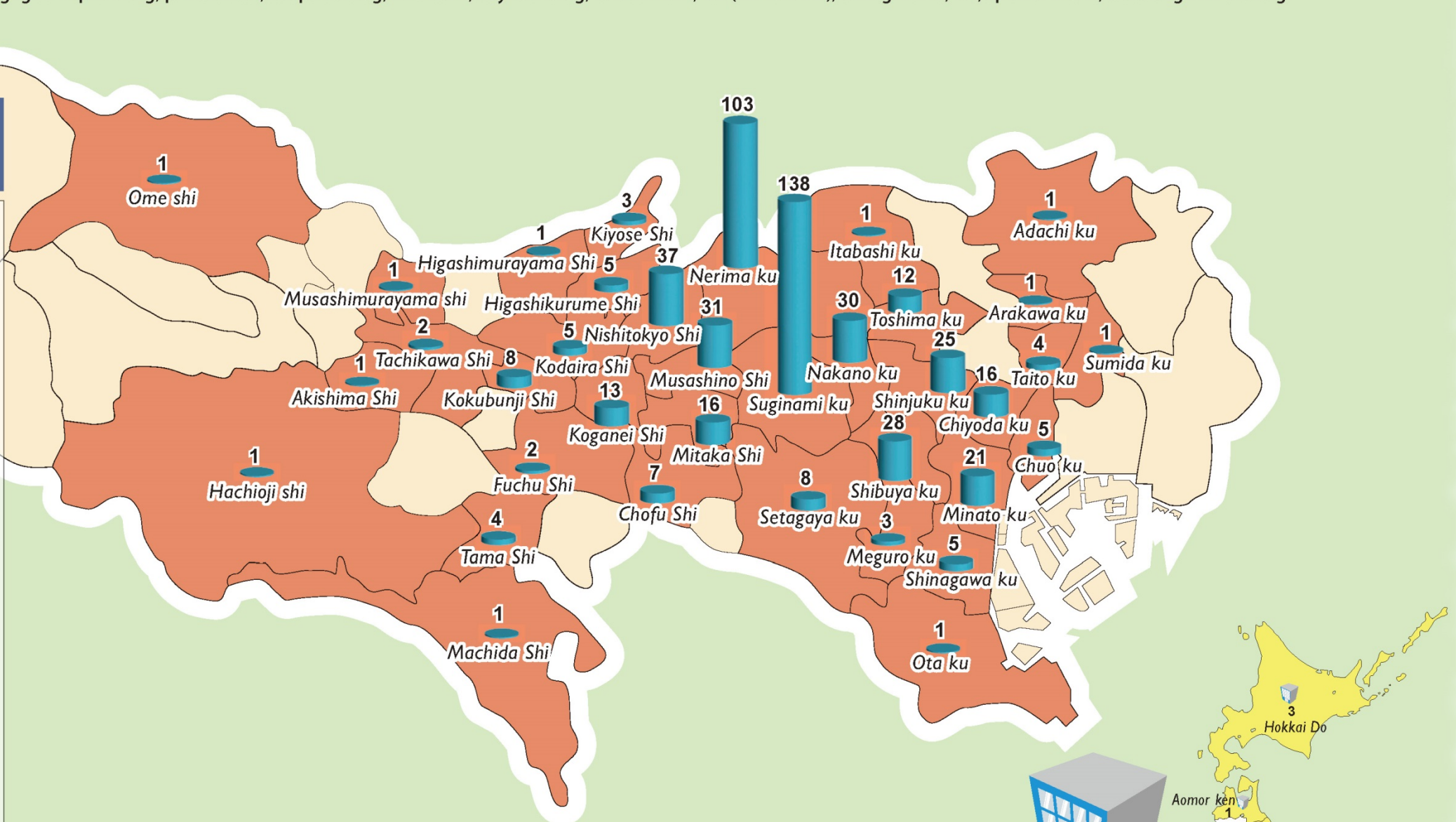


# Distribution of Japanese animation studios (2016 version)

\* Animation studios herein includes business operators engaged in planning, production, script writing, direction, key-drawing, in-between, CG (2D and 3D), background, art, special effect, shooting and editing.

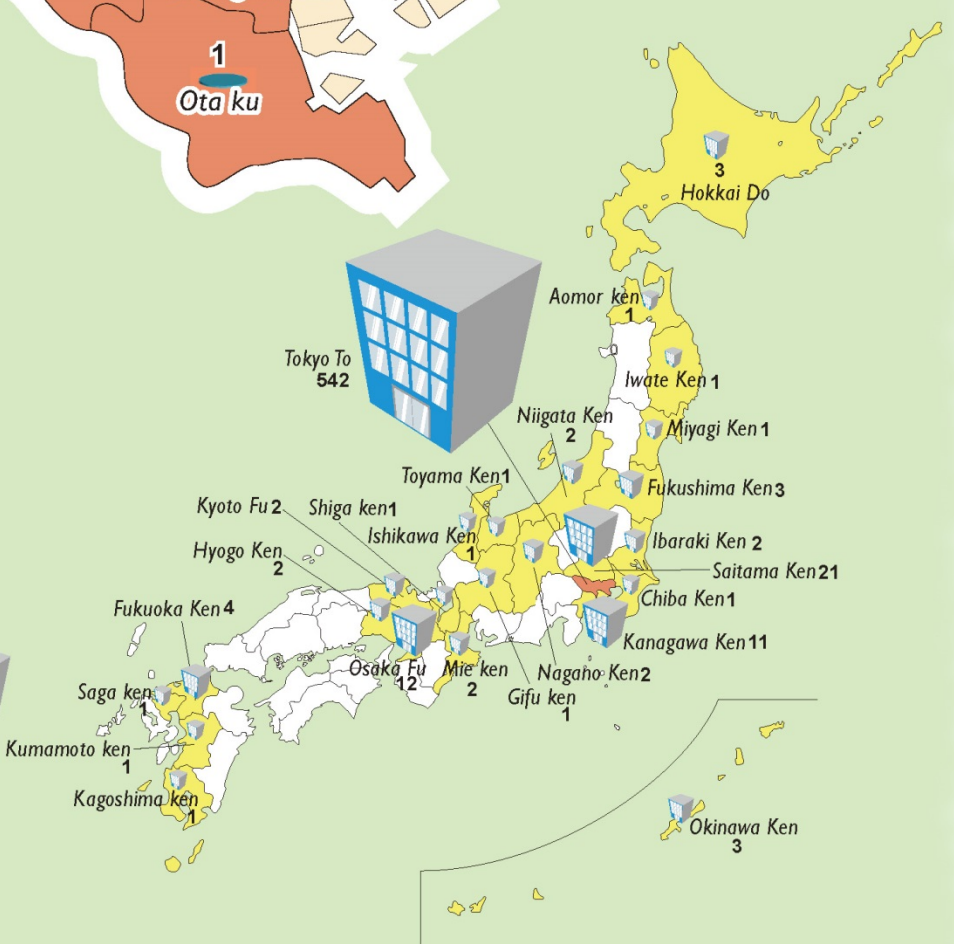
## The trend seen in the distribution map of anime studios

In Tokyo, 542 anime studios (i.e. business operators engaged in planning, production, script writing, direction, key-drawing, in-between, CG (2D and 3D), background, art, special effect, shooting and editing) are located, which is 87.1 % of all Japanese studios. The map also shows many of them are concentrated in Suginami (138) and Nerima (103). This reflects the history of Japanese animation industry. Since Toei-Doga (now Toei Animation) and Mushi Production were originally in Oizumi and Fujimidai respectively, many other studios were also established in the area along Seibu Ikebukuro line and in its neighborhood in Nerima. In terms of Suginami, many are concentrated in Shimoigusa, logi and Kamigusa, the area along the Seibu Shinjuku line, and in Koenji, Asagaya and Ogi-kubo, the area along JR Chuo line. This is because the Seibu Shinjuku line is close to the studios along the Seibu Ikebukuro line, also Tokyo Movie Shinsha (now TOMs Entertainment) was in Minami Asagaya close to JR Chuo line in 1970's. Comparing the distribution map in 2001 and that in 2016, the number of the studios increased remarkably both in Suginami (from 70 to 128) and Nakano (from 14 to 30). This is because the convenience value of those two areas increased since TOMs Entertainment and Toei Animation moved the headquarters to Nakano in 2012 and in 2013 respectively.



## Anime Production in Local Cities

While anime studios are overly concentrated in Tokyo, some local studios, such as Kyoto Animation (in Uji city, Kyoto) and P.A. WORKS (in Nanto city, Toyama), are doing well constantly. Those studios take advantages of local cities where they can focus solely on animation production despite a lack of convenience. Actually there are more cases that animation studios with the headquarters in Tokyo have branch studios outside Tokyo. One example is Asahi Production Miyagi Shiraishi Studio established in Miyagi in 2010. The studio, specialized in digital production, engages in animation production working together with the main studio in Tokyo connected via the Internet. Another example is Trigger Fukuoka Studio established in 2016, planning to hire staff with a view to digital drawing. From now on, a lot more studios will show interest in establishing local studios specialized in digitalized production. On the other hand, there are some studios with training facilities. WHITE FOX Izu Studio, established in 2016, has a dormitory where new employees live together while receiving training as animators. We need to pay attention how such movement brings a change to the structure of current animation industry.



Based on the survey by the Association of Japanese Animations

# 1.825 trillion yen market in 2016

## Latest Trends of Japanese Animation Industry

# Anime Industry 2016

We, the Association of Japanese Animations, are engaged in research, survey, and analysis of markets in connection with Japanese animation industry. We have also published "Anime Industry Report" since the year 2009 in order to disseminate the industrial information to the world.

In the year 2016 edition, the market size was 1.825 trillion yen, increasing by 12.0 % year over last year, reflecting the continued rise in the sales of Internet distribution rights to China (up 78.7% over last year) and remarkable growth of Live Entertainment market (up 68.4 % over last year).

The book also has "All Animation Works Perfect Data in 2015" as appendix. This proven and trusted data has been adopted as an official material for various databases including Media Fine Arts Database by the Agency for Cultural Affairs.

The Anime Industry Report 2015 is the book useful for all people involved in the animation industry including researchers, industrial figures and students who hope to work in the industry in future.

### ■Outline

- 【Title】** Anime Industry 2016  
**【Publisher】** The Association of Japanese Animations  
**【Release day】** September 30, 2016  
**【Size/Pages】** A4/74 pages, inserted chart sheets (report) + A4/70 pages (appendix: All Animation Works Perfect Data in 2015) + A3/4 pages (inserted chart sheets)  
**【Price】** 6,000 yen (tax excluded)  
**【Index】**

#### 1. Overview of Japanese animation industry in 2015

※Overall market trends, domestic industrial movements and notable trends

#### 2. Explanation of Media

※Animation distribution market (TV animation, theatrical animation, videogram, the Internet distribution), secondary use (including merchandising), music and live entertainment

#### 3. Trends in Overseas Markets

※Japanese animation in global markets

#### 4. Distribution Map of Japanese Animation Studios

#### Appendix: All Animation Works Perfect Data in 2015

※TV, theatrical animation, OVA

#### Material

※Trends of Japanese animation market, Recent movement of Japanese animation industry and market, Development of Japanese animations in overseas market and Distribution Map of Japanese animation studios

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※The back issues (2009 version - 2015 version) are also available at the stores above.

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