Anime Industry Report 2022

Summary

Authors

Hiromichi Masuda	Anime Industry Researcher Auditor, Video Market Corporation
Tadashi Sudo	Journalist Appointed professor, Japan University of Economics Graduate School,Entertainment Business Institute
Toshiyuki Koudate	Codate CO.,LTD.　Representative Director
Atsushi Matsumoto	Atsushi Matsumoto / Journalist / Associate Professor, Keiwa Gakuen College
Kazuo Rikukawa	President, Character Databank, Ltd. Director/Secretary-General, Character Brand Licensing Association
Tomotaka Ishida	ADK Emotions Inc.　Content Business Div　Planning Director
Yasuo Kameyama	Ph.D. Student, Graduate School of Media Design, Keio University Senior Director of C i P Committee
Yuji Mori	President, Senior Director, Dentsu Consulting Inc. Specially Appointed Professor, Graduate School of Asia University
Masahiro Hasegawa	Producer, HUMANMEDIA Inc. Part-time Lecturer, School of Network and Information, Senshu Univercity

Editor

Hiromichi Masuda (editor in chief)	Anime Industry Researcher Auditor, Video Market Corporation
Masahiro Hasegawa	Producer, HUMANMEDIA Inc. Part-time Lecturer, School of Network and Information, Senshu Univercity
Misako Ashikawa	HUMANMEDIA Inc.

Cooperation in Material Research

Mitsuru Soda	Animation Researcher, curator eiga.com inc.　Director

Editorial Cooperation

Hiroko Uehara	Part-time Lecturer , Shobi University Graduate School
Megumi Onouchi	President, HUMANMEDIA Inc. Vice Chairman, The Association of Japanese Animations, Digital production environment Committee Vice Chairman, The Association of Japanese Animations, Human Resources Development Committee

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The Association of Japanese Animations

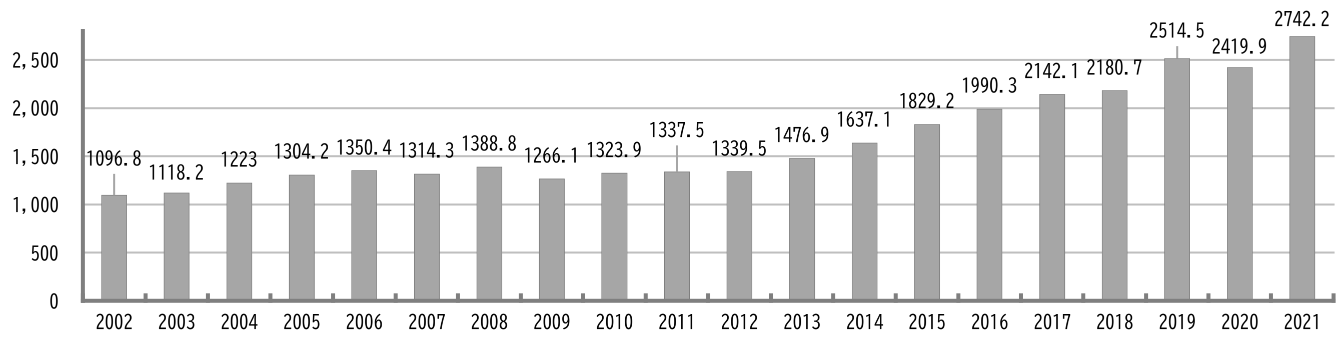
Only a Year After the Effects of COVID-19, 2021 Returned to Basic Growth Trends

The anime industry was very affected by the COVID-19 pandemic in 2020, but it recovered quickly by 2022. The entire industry was gripped by nervousness when the state of emergency was announced in April 2020, but production pace was back to normal in the second half of the year due to developments such as the introduction of remote work. As a result, 2021 showed the highest profits in history, surpassing the previous highest-grossing year, 2019. We can see that there is a stable demand for anime from the free-answer surveys taken by all the anime studios.

〈The Industry Reached 2.74 Trillion Yen, 113.3% of the Previous Year, Showing a Return to Growth Trends from Before COVID-19〉

The anime industry market had grown for ten years straight from 2010 to 2019, but in 2020, the direct hit from the COVID-19 pandemic made it drop to 96.5% of the previous year. The pandemic continued into 2021, but profits grew dramatically to 2.74 trillion yen, 113.3% of the previous year. 2021 created a new record of 9.1% over 2019's 2.51 trillion yen, the previous record, and it is believed that the effects of COVID-19 were firmly stopped in their tracks. On the other hand, the domestic market is forecasted to shrink due to the decreasing birthrate and aging population. Moreover, the global streaming market may have reached its peak. The industry seems to be losing the momentum that it reached in the mid-2010s. This shift will gain considerable attention moving forward.

[Figure 1] The Japanese Animation Market in a Broad Sense (Yen in billions)



[Figure 2] Japanese animation market trends in a broad sense (billion yen)

item	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
①TV	124.1	116.5	110.0	104.1	100.3	92.4	94.6	95.5	89.5	90.0	96.0
②Movie	21.8	19.1	40.2	18.8	28.9	21.6	34.8	31.1	33.7	28.5	40.9
③Video	129.4	117.6	103.1	138.8	135.8	127.8	111.3	105.2	108.5	107.6	105.9
④Internet Distribution	0.2	1.0	1.8	4.1	8.4	9.8	10.2	12.3	14.9	16.0	27.2
⑤Merchandising	435.0	433.7	461.7	504.9	530.5	597.4	536.4	559.7	627.4	594.3	573.2
⑥Music	13.8	9.1	23.5	12.0	26.1	26.3	35.0	41.4	40.6	32.5	28.3
⑦Overseas	372.5	421.2	482.7	521.5	520.4	439.0	413.7	254.4	286.7	266.9	240.8
⑧The Pachinko and the like	-	-	-	-	-	-	152.8	166.5	122.6	202.6	227.2
⑨Live Entertainment	-	-	-	-	-	-	-	-	-	-	-
Total	1096.8	1118.2	1223.0	1304.2	1350.4	1314.3	1388.8	1266.1	1323.9	1337.5	1339.5

item	2013	2014	2015	2016	2017	2018	2019	2020	2021	YoY
①TV	102.7	111.6	107.3	105.6	106.1	113.7	94.8	84.0	90.6	88.5%
②Movie	47.0	41.7	47.7	66.3	41.0	42.6	69.2	55.4	60.2	89.2%
③Video	115.3	102.1	92.8	78.8	76.5	58.7	56.3	46.6	66.2	82.8%
④Internet Distribution	34.0	40.8	43.7	47.8	54.0	59.5	68.5	93.0	154.3	135.8%
⑤Merchandising	598.5	655.2	579.4	552.2	503.7	500.3	586.8	581.9	663.1	99.2%
⑥Music	29.6	29.2	32.4	36.9	34.4	35.8	33.7	27.6	31.7	81.9%
⑦Overseas	282.3	326.6	583.4	767.7	994.8	1009.2	1200.9	1239.4	1313.4	103.2%
⑧The Pachinko and the like	242.7	298.1	294.1	281.8	268.7	283.5	319.9	263.0	305.6	82.2%
⑨Live Entertainment	24.8	31.8	48.4	53.2	62.9	77.4	84.4	29.0	57.1	34.4%
Total	1476.9	1637.1	1829.2	1990.3	2142.1	2180.7	2514.5	2419.9	2742.5	113.3%

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

Thinking of the Primary Factors Driving the 2021 Market

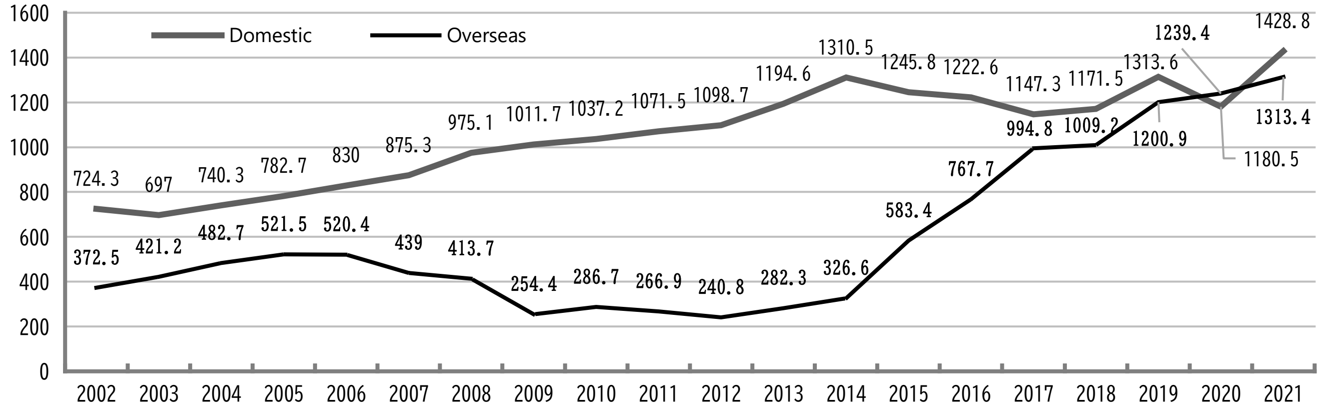
〈Internet Streaming, Merchandising, and Foreign Business Drove the Market's Record High in 2021〉

The Japanese anime industry has been steadily growing since 2010, but the unprecedented COVID-19 pandemic that raged havoc in 2020 stopped that growth in its tracks, with the industry making only 96.2% of the previous year's profits. However, the main reason for that is the reduced profits that came about from schedule delays were carried forward. In the free response section of the survey, studios said that production orders have continued to increase and that the number of projects is more than the number of production studios available, so production costs continue to rise. Because of that, there's a high possibility that earnings will improve. This shows that the Japanese anime market is supported by stable demand. All fields of the industry profited in 2021 compared to 2020, but compared to the previous records made in 2019, the fields that increased were Video, Streaming, Merchandising, and International. TV, Movies, Music, Amusement, and Live Viewing fields all declined. The fields that drove the growth in 2021 were Streaming (+86 billion yen compared to 2019, a share increase of 37.6%), Merchandising (+76 billion yen compared to 2019, 33.5%), and International (+113 billion yen, 49.3%). Together, they increased to 275 billion yen, but Movie, Amusement, Live Viewing, and other fields declined, so compared to 2019, the total industry increased by 228 billion yen. It can be said that those three windows are what supported the growth of the anime industry in 2021.

〈The International Market Recovered From the Previous Year But Didn't Reach Domestic Figures〉

The international market improved 74 billion yen (106%) from the previous year - from 1.24 trillion yen to 1.31 trillion yen. That is an improvement of 113 billion yen (109.4%) over 2019's 1.2 trillion yen. The international market has continued to grow since the 2000s, when content like Pokémon expanded overseas. After that, it has seen many struggles such as the collapse of the Video market, rampant internet piracy, Chinese broadcast restrictions, the 2008 financial crisis, and the appreciation of the yen. Nonetheless, with the improvement of internet services in the mid-2010s, Chinese binge purchases of legitimate content guided by the government, and rapid progress of American streaming platforms, the International field has grown rapidly. Plus, that momentum kept up even during the COVID-19 pandemic, as the number of people staying at home became an impetus for continued growth, so it overtook the domestic market in 2020. However, in 2021, the domestic market reversed the situation by a small margin. The domestic Streaming market rebounded grandly, which led to the change, but the international market itself had also grown to three times its original size between 2015 and 2017, and now in the 2020s, it seems as if it is gradually leveling out. For Japan, which has a decreasing birthrate and an aging population, the trend of decline of the international market is one to be concerned about.

[Figure 3] Comparison of Domestic and International Anime Markets (Broad Anime Market/Units of Hundred Million Yen)

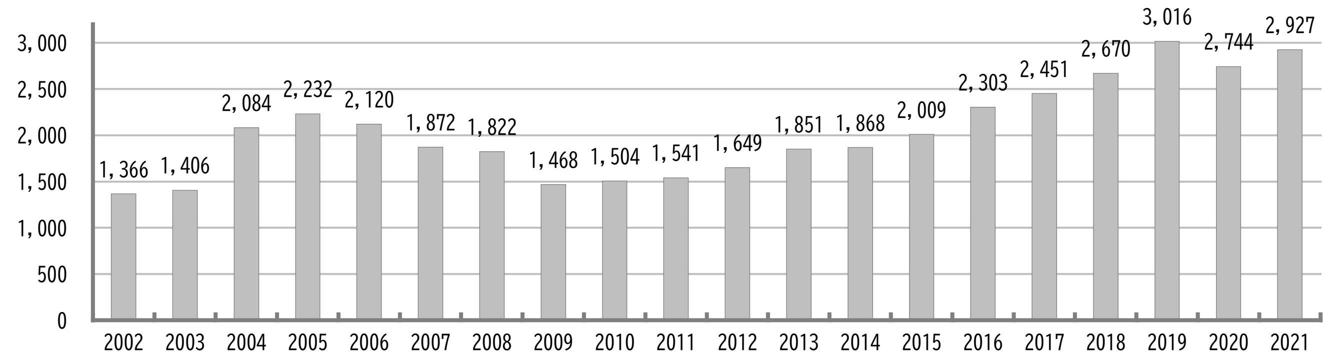


Based on questionnaires conducted by the Association of Japanese Animations
※The annual average rate of Principal Global Indicators is adopted as the exchange rate.

〈The 2021 Anime Industry (Profits of the Small Anime Market/Production Companies)〉

The anime industry is a market of studios that produce and create content. In 2021, this market increased by 18.3 billion yen (106.7%) compared to COVID-stricken 2020 to 293 billion yen. It did not reach the record high of 2019, which was 302 billion yen, but it can be said that the market is returning to its pace of growth before the pandemic.

[Figure 4]Trends in Japanese animation market in a limited sense



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

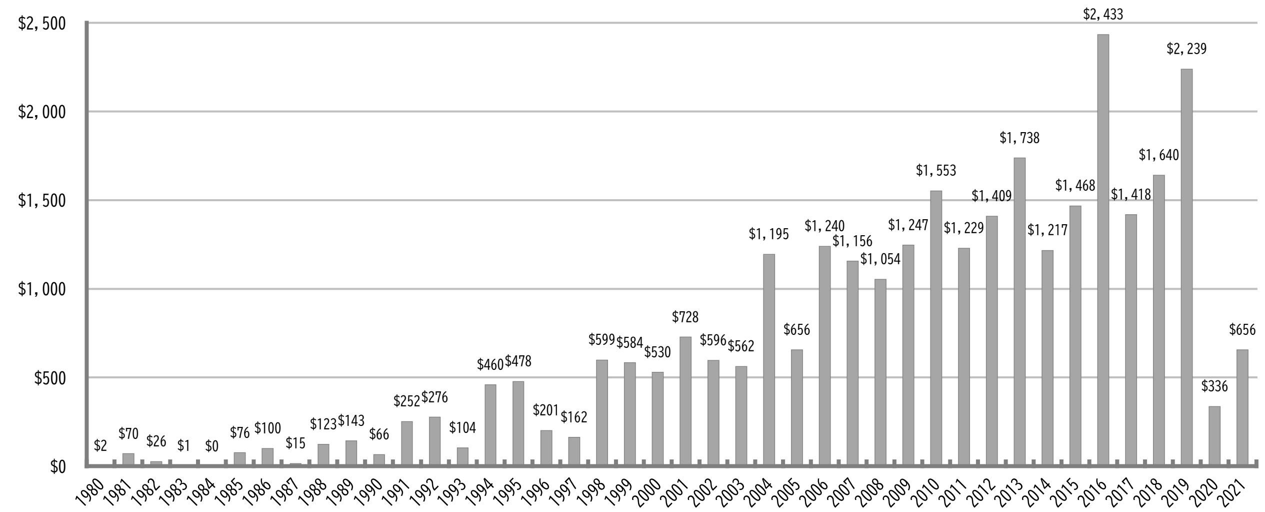
〈The Future of Increasing Production Costs〉

Production costs have continued to increase over the past few years. Just like last year, multiple free answers on the surveys alluded to rising production and other costs. "Because of soaring labor costs due to work style reforms, there has been a sharp rise in unit costs when hiring contractors, so anime production costs are rising at a faster speed than the costs for orders. Additionally, since there is a shortage in production and creation staff, it is very difficult to create an anime production system. The standards required for anime production are steadily growing, which is a primary factor in the increase in cost." This description is an example of the cycle of how implementing work style reforms requires hiring more personnel, which leads to rising costs, but then as that continues, there is a shortage in human resources which leads to even higher labor costs. Of course, that is the same for contractors. How long will this continue? How will the industry adapt?

〈The North American Box Office in 2021 ~ What Is Happening in the United States?〉

Because of the COVID-19 pandemic in 2020, out of the three major anime movie markets (including domestically produced animation), Japan and China were not very affected. However, the biggest market, North America, had box-office takings that were only 14% of the earnings in 2019, showing devastating effects from the pandemic. The market was expected to bounce back in 2021, but while it did increase from the previous year, it stopped at 29.3% of earnings in 2019 at 6.5 hundred million dollars. That was not a direct result of the COVID-19 pandemic, but it is likely due to the acceleration of Streaming becoming customers' first option for several reasons, including movie theater closings. Pixar and Disney had boosted the American animation industry since the mid-2000s, but they changed direction to releasing some films only on streaming platforms without a theatrical release, which had a great effect on the movie theater industry. This is potentially a dangerous problem not just for American movie animation, but for animation overall. The North American animation box office has not seen a hit after the COVID-19 pandemic, so it will collapse if this continues. Now that Pixar and Disney are focusing on streaming, there is great attention on their future practices.

[Figure 5]The Shifts in the North American Animation Box Office (Including Foreign Films) from 1980 to 2021 (in Millions of Dollars)



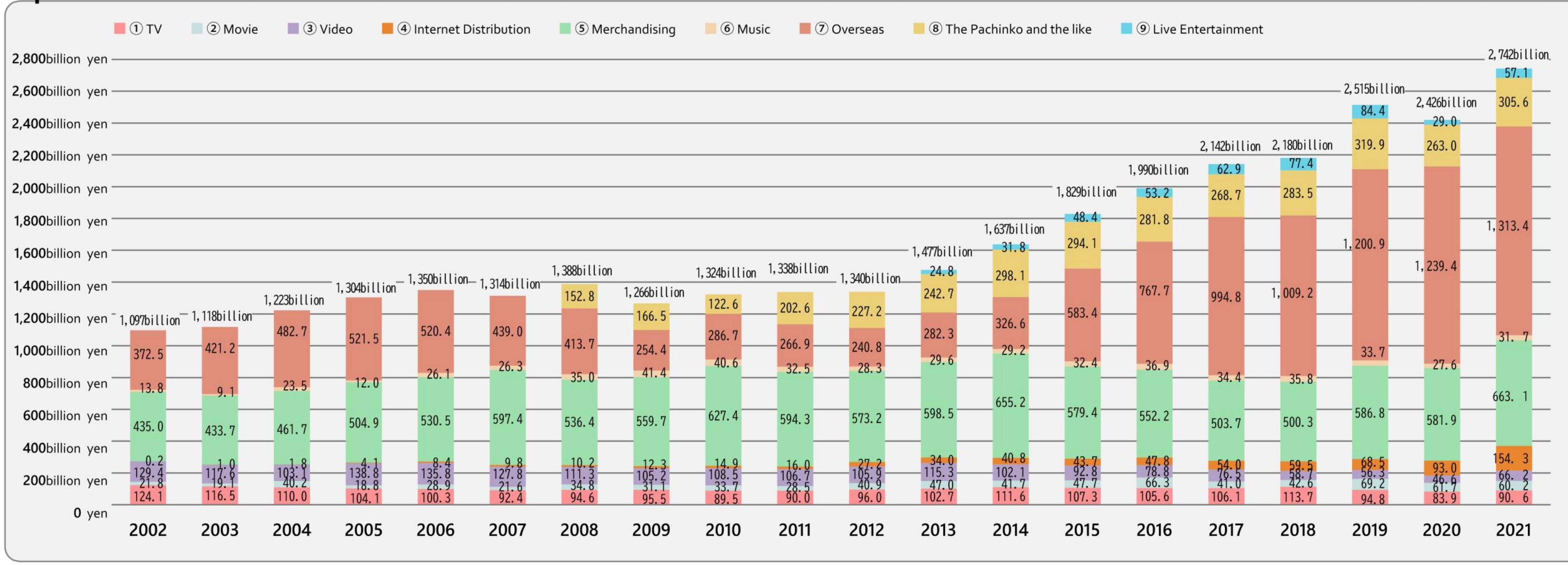
Created by the Association of Japanese Animations based on data from Box Office Mojo

Chart-1

Trends in Japanese Animation Market (2022version)

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 – 2021〉



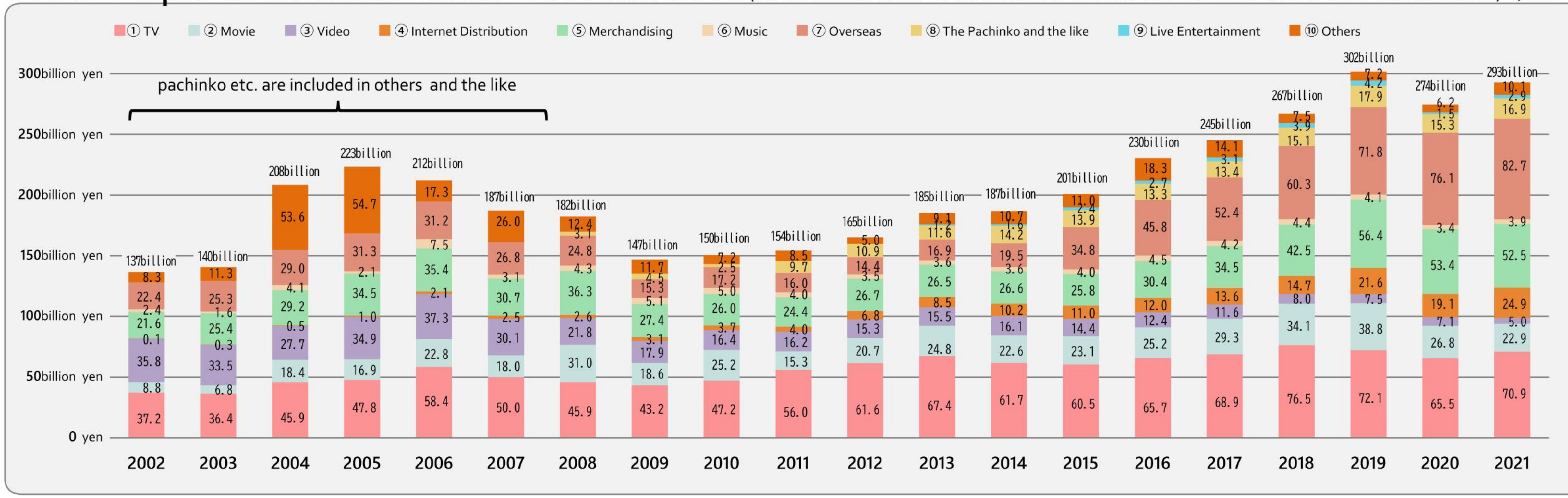
Definition of each item (end-user basis)

1) TV: domestic TV animation revenues
2) Movie: domestic theatrical animation box office revenues
3) Video: domestic videogram animation revenues (DVD, etc. media)
4) Internet Distribution: domestic online animation revenues
5) Merchandising: domestic animation-related merchandise revenues
6) Music: domestic animation-related music revenues
7) Overseas: overseas Japanese animation revenues (movie, TV, videogram, MD, etc.)
8) Pachinko and Pachinko-slot machine: estimated shipment value of animation character-themed Pachinko and Pachinko-slot machine machines.
9) Live Entertainment: animation-related live-performance, event, exhibition, and cafe revenues (Note 4)

Note 1: Domestic TV animation revenues were calculated based on the following formula: (the sum of commercial TV broadcast stations' revenues and NHK's broadcast revenues) x (the ratio of animation program to overall program broadcast minutes) + (revenue of animation channels)
Note 2: Pachinko and Pachinko-slot machine with animation character values were estimated based on their percentage of total Pachinko and Pachinko-slot machine shipments.
Note 3: The survey for Pachinko and Pachinko-slot machine started from 2008.
Note 4: The survey for Live Entertainment started from 2013. The amount is the sum of the revenues of the following: anime song/voice actor appearances, events, 2.5D musicals, museums, exhibitions, cafés.
Note 5: The revenues for Merchandising from 2007 to 2013 were recalculated in 2014.

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 – 2021〉



Definition of each item (animation studio basis)

1)TV: a total of revenues from TV animation production and distributions of broadcasting revenues receivable by studios
2) Movie: a total of revenues from theatrical animation production and distributions of box office revenues receivable by studios
3) Videogram: a total of revenues from OVA production and distributions of Videogram sales receivable by studios
4) Internet: a total of revenues from original animation production and distributions receivable by studios in connection with Internet distribution
5) Merchandising: a total of distributions receivable by studios in connection with rights licensed for merchandising, promotions, and events
6) Music: a total of distributions receivable by studios in connection with music CDs and Internet distribution (included since 2008)
7) Overseas: a total of overseas sales in connection with rights licensed for TV, Movie, Videogram, Internet and Merchandising
8) Pachinko: a total of revenues from animation production for Pachinko and distributions receivable by studios in connection with rights licensed for Pachinko
9)Live Entertainment: a total of distributions receivable by studios in connection with rights licensed for Live Entertainment
10)Others: revenue from services/businesses other than above

Note 6: The survey for Pachinko and Pachinko-slot machine started from 2008. Figures for this industry were included in "Others" until 2007.

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

Chart-2

Trends in Japanese Animation Market (2022 version)

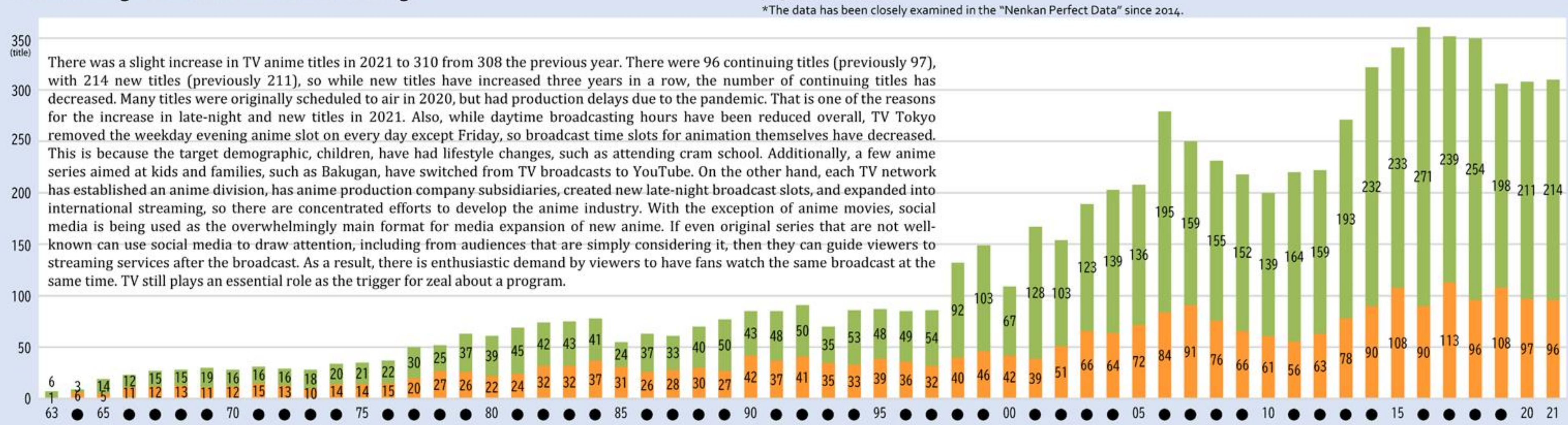
The Domestic Anime Market Overtook the International Market After the COVID-19 Pandemic, Supported by Streaming and Merchandising

TV Animation programs (1963-2021)

The Changing Television Broadcast Initiatives: Connecting TV Broadcasts and Streaming with Social Media as a Bridge

TV animation programs newly broadcast in the year.
TV animation programs broadcast/serialized continuously from the previous years.
*TV animation programs, animations inserted in other TV programs, and TV animations combined with live-action programs are all covered.
*The data has been closely examined in the "Nenkan Perfect Data" since 2014.

There was a slight increase in TV anime titles in 2021 to 310 from 308 the previous year. There were 96 continuing titles (previously 97), with 214 new titles (previously 211), so while new titles have increased three years in a row, the number of continuing titles has decreased. Many titles were originally scheduled to air in 2020, but had production delays due to the pandemic. That is one of the reasons for the increase in late-night and new titles in 2021. Also, while daytime broadcasting hours have been reduced overall, TV Tokyo removed the weekday evening anime slot on every day except Friday, so broadcast time slots for animation themselves have decreased. This is because the target demographic, children, have had lifestyle changes, such as attending cram school. Additionally, a few anime series aimed at kids and families, such as Bakugan, have switched from TV broadcasts to YouTube. On the other hand, each TV network has established an anime division, has anime production company subsidiaries, created new late-night broadcast slots, and expanded into international streaming, so there are concentrated efforts to develop the anime industry. With the exception of anime movies, social media is being used as the overwhelmingly main format for media expansion of new anime. If even original series that are not well-known can use social media to draw attention, including from audiences that are simply considering it, then they can guide viewers to streaming services after the broadcast. As a result, there is enthusiastic demand by viewers to have fans watch the same broadcast at the same time. TV still plays an essential role as the trigger for zeal about a program.



Based on a survey conducted by the Association of Japanese Animations

Production Minutes of TV Animations (2000-2021)

The Growth of Late-Night Anime Compensates for the Loss of Daytime Anime

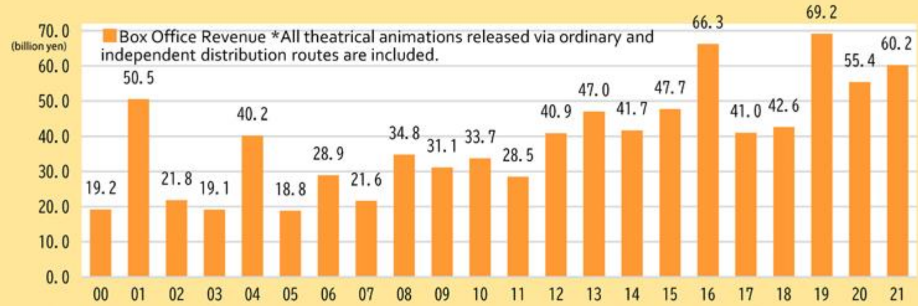
In 2021, the number of anime production minutes was 106.4% of the previous year at 109,610 minutes (previously 103,021). While the production minutes for daytime anime has reduced to 42,967 minutes (88.4% of the previous year), late-night slots increased drastically to 66,643 minutes (122.4% of the previous year). The growth of late-night anime slots is compensating for the reduction of daytime anime slots. More minutes of TV anime have generally been produced since the end of the 1990s, due to the increase in late-night anime, and reached a record high in 2006. After that, the numbers continued to drop until 2010 due to the decline in the Video market but rebounded after 2011 until 2018 due to the expansion of fields such as Amusement, International, Streaming, and Live Entertainment. It saw another declining trend until 2020, but in 2021, it suddenly began increasing once again. Because of the COVID-19 pandemic, many titles were delayed, which caused a decrease in 2020, but were broadcast in 2021, causing an uptick in production minutes.

Based on a survey conducted by the Association of Japanese Animations

Box Office Revenue of Theatrical Animations (2000-2021)

Despite Not Having Any Mega-Hits, Several Titles Drove the Market Scale to Its 3rd Largest Size in History

The earnings of anime movies in 2021 were 108.6% of the previous year at 60.2 billion yen. That puts it in third place after 2019's 69.2 billion yen and 2016's 66.3 billion yen. These calculations total all of the movies released from January 1st to December 31st and their profits, so profits from movies with release periods that stretch over two years are split across the earnings record of both those years. As a result, 2021's records include 8 billion yen from Demon Slayer The Movie - Mugen Train. Until now, years with top records had historical record-breaking Japanese anime movie mega-hits, but in 2021, multiple titles supported the growth of the industry: *Evangelion: 3.0 + 1.0 Thrice Upon a Time, Detective Conan: The Scarlet Bullet, Belle, and Jujutsu Kaisen* 0, released in December. Put together, these movies reached profits of over 60 billion yen.



Source: The Association of Japanese Animations, based on the data by Motion Picture Producers Association of Japan/Kinema Jumpo/Bukatsushinsha(Data edited by Mindbase Inc. from 2000 to 2008 and by the Association of Japanese Animations from 2009 to 2020)

The Number of Theatrical Animation Works and the Production Minutes (2000-2021)

Staple Series Released No Films, But Production Minutes and Titles Increased

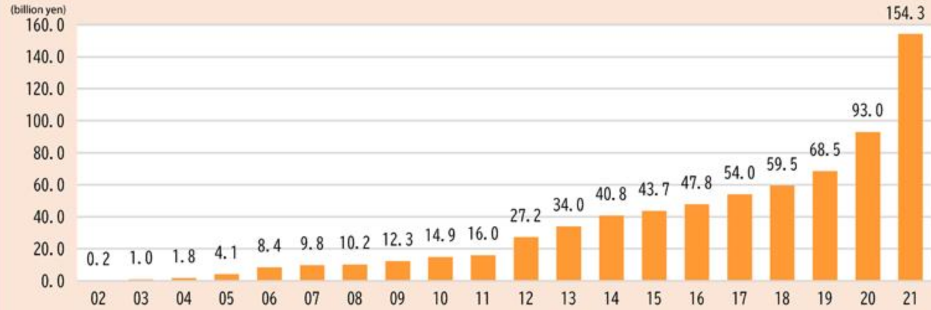
The number of production minutes in 2021 increased by 17% to 6,057 (5,166 the previous year). There were 73 titles (previously 71) released. Because of the COVID-19 pandemic in 2020, several anime movies were canceled or delayed; their release in 2021 affected the number of 2021 production minutes. However, staple series such as Pokémon or Doraemon did not release any movies, so it cannot be said that the industry has fully escaped the effects of COVID-19. Still, 11 anime movies made more than 1 billion yen in 2021, which is 3 films more than 2020's 8 movies. There is strong demand for and stability in anime.

Based on the survey conducted by the Association of Japanese Animations

Animation Distribution via the Internet (2002-2021)

The Continuously Escalating Pace of Anime Streaming

The profits from domestic anime streaming in 2021 was 165.6% of the previous year at 154 billion yen, which is a much quicker pace than previous years. The long COVID-19 pandemic and the stay-at-home demand resulting in the popularization of subscription streaming services are underlying reasons for the escalation. The Streaming market exceeded the Video Package market in 2019 and the Television market in 2020, and became the de facto central window for anime viewership. On the other hand, now that the world is going back to normal, it seems as if the expansion of the Network market began slowing down in the latter half of 2021. Internet streaming of TV broadcasts and pay-per-view work well with anime, so those usages and expectations have expanded, but it remains to be seen if the anime streaming market can continue to maintain or grow from its current 150 billion yen scale.



Based on a survey conducted by the Association of Japanese Animations

Animation videograms (2000-2021)

※Revenues of Videogram are calculated based on the total sales of Japanese animation for adults and Japanese animation for children among the genres in the report by the Japan Video Software Association.

Hit Titles Can Drive the Market to a Sudden Expansion

In 2020, the Japanese anime Video Package profits were 117.5% of the previous year for 66 billion yen. The market had been declining steadily for the past seven years since 2013, but it suddenly increased. The releases of Demon Slayer The Movie - Mugen Train (9.7 billion yen) and Uma Musume: Pretty Derby Season 2 (7.4 billion yen) supported the jump up. Those two titles were breakthrough hits even when compared to the past decade, making up 26% of the 2021 Anime Package market. All titles below those reached similar levels of previous years. The Japan animation package market is the global exception, as it continues to profit even as the rest of the world is shifting to Streaming. It is believed that the purchases of anime packages continue in Japan due to the many opportunities to interact with anime both in the real world and on the internet.

Based on a report by Japan Video Software Association

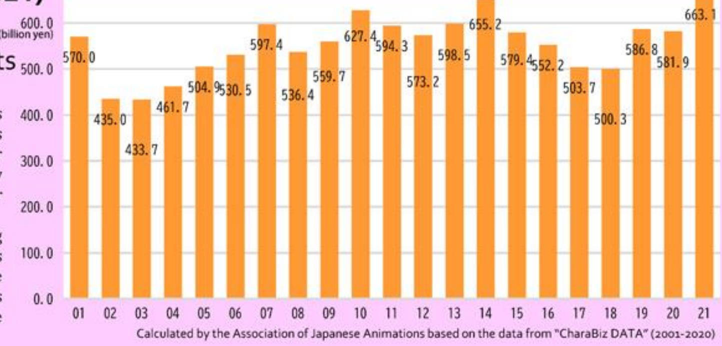
Merchandising Related to Animation (2000-2021)

※Revenues arising only from Japanese animation characters ranked in the top 100 characters selling well in Japan were tallied.
※No uses of advertisement, promotion, or Pachinko are included.
※The values from 2007 to 2013 are recounted in 2014.

Characters Are Shifting From Sources of Comfort to Targets of Support

The 2021 Japanese anime character merchandising market grew dramatically to 114% of the previous year at 663 billion yen. Due to the continuing COVID-19 pandemic, restricted admission to events caused difficulties in selling merchandise, but sales were still favorable due to e-commerce and other linked online activities. Looking at separate titles, the merchandising of many different anime series saw positive sales results, such as Demon Slayer, which had become a social phenomenon the previous year and continues to support the market, Pokémon, Evangelion, Sumikkogurashi, and more.

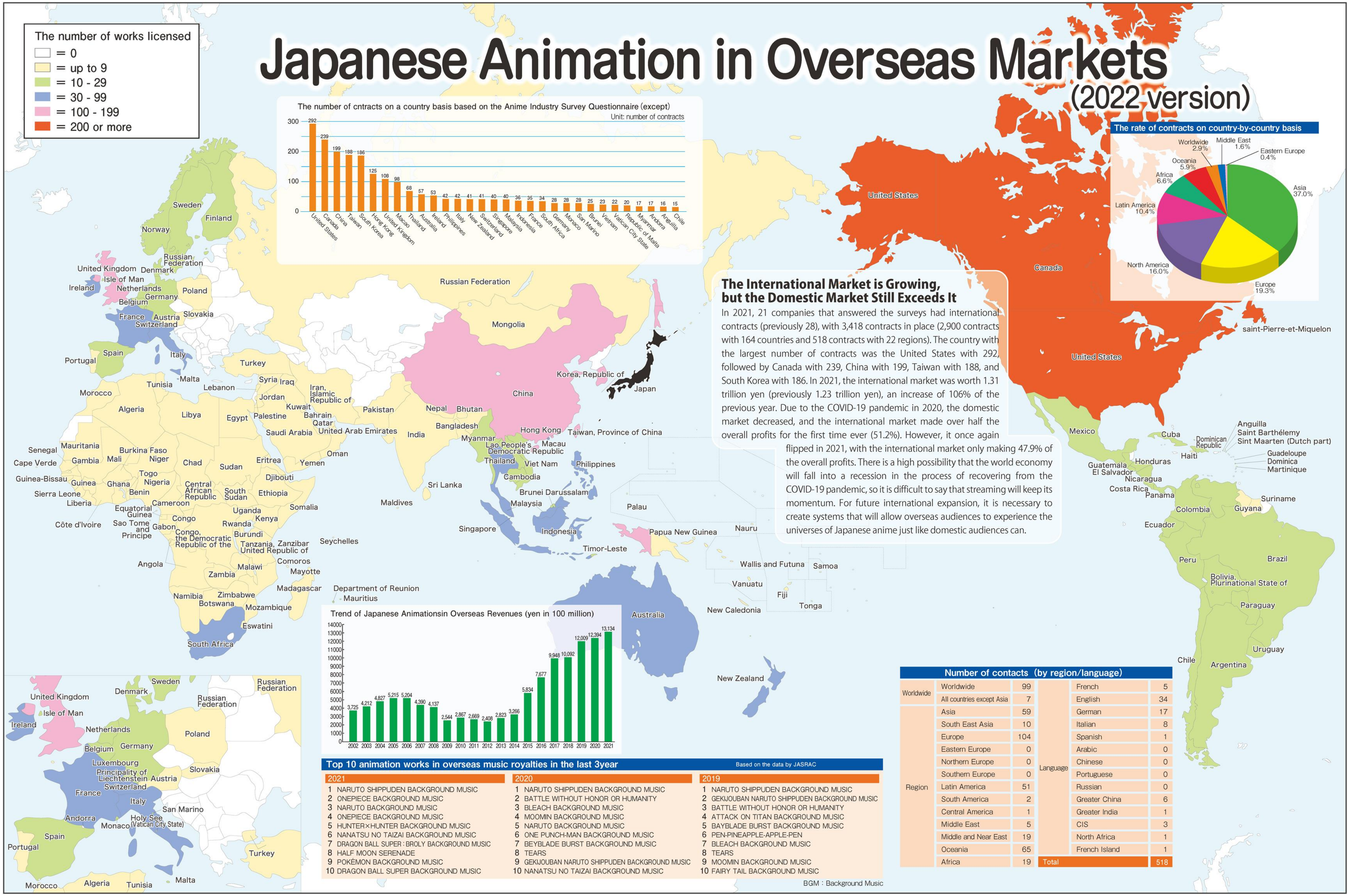
Through the connections on social media and the great influence that video streaming has, categorizing the character field as being for core fans or kids and families no longer seems valid when considering its current conditions. Until now, characters have been a source of comfort to help relieve some of the stress of daily life, but now they are targets of support that give viewers energy and vitality. The changes in consumption due to people pouring money into their favorite characters have contributed to the expansion of the market.



Calculated by the Association of Japanese Animations based on the data from "CharaBiz DATA" (2001-2020)

Chart-3

Japanese Animation in Overseas Markets (2022 version)



The International Market is Growing, but the Domestic Market Still Exceeds It

In 2021, 21 companies that answered the surveys had international contracts (previously 28), with 3,418 contracts in place (2,900 contracts with 164 countries and 518 contracts with 22 regions). The country with the largest number of contracts was the United States with 292, followed by Canada with 239, China with 199, Taiwan with 188, and South Korea with 186. In 2021, the international market was worth 1.31 trillion yen (previously 1.23 trillion yen), an increase of 106% of the previous year. Due to the COVID-19 pandemic in 2020, the domestic market decreased, and the international market made over half the overall profits for the first time ever (51.2%). However, it once again flipped in 2021, with the international market only making 47.9% of the overall profits. There is a high possibility that the world economy will fall into a recession in the process of recovering from the COVID-19 pandemic, so it is difficult to say that streaming will keep its momentum. For future international expansion, it is necessary to create systems that will allow overseas audiences to experience the universes of Japanese anime just like domestic audiences can.

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

Based on the data by JASRAC

	2021	2020	2019
1	NARUTO SHIPPUDEN BACKGROUND MUSIC	NARUTO SHIPPUDEN BACKGROUND MUSIC	NARUTO SHIPPUDEN BACKGROUND MUSIC
2	ONEPIECE BACKGROUND MUSIC	BATTLE WITHOUT HONOR OR HUMANITY	GEKIJOUBAN NARUTO SHIPPUDEN BACKGROUND MUSIC
3	NARUTO BACKGROUND MUSIC	BLEACH BACKGROUND MUSIC	BATTLE WITHOUT HONOR OR HUMANITY
4	ONEPIECE BACKGROUND MUSIC	MOOMIN BACKGROUND MUSIC	ATTACK ON TITAN BACKGROUND MUSIC
5	HUNTER×HUNTER BACKGROUND MUSIC	NARUTO BACKGROUND MUSIC	BAYBLADE BURST BACKGROUND MUSIC
6	NANATSU NO TAIZAI BACKGROUND MUSIC	ONE PUNCH-MAN BACKGROUND MUSIC	PEN-PINEAPPLE-APPLE-PEN
7	DRAGON BALL SUPER : BROLY BACKGROUND MUSIC	BEYBLADE BURST BACKGROUND MUSIC	BLEACH BACKGROUND MUSIC
8	HALF MOON SERENADE	TEARS	TEARS
9	POKÉMON BACKGROUND MUSIC	GEKIJOUBAN NARUTO SHIPPUDEN BACKGROUND MUSIC	MOOMIN BACKGROUND MUSIC
10	DRAGON BALL SUPER BACKGROUND MUSIC	NANATSU NO TAIZAI BACKGROUND MUSIC	FAIRY TAIL BACKGROUND MUSIC

BGM : Background Music

Number of contacts (by region/language)

Worldwide	Worldwide	99	Language	French	5
	All countries except Asia	7		English	34
Region	Asia	59		German	17
	South East Asia	10		Italian	8
	Europe	104		Spanish	1
	Eastern Europe	0		Arabic	0
	Northern Europe	0		Chinese	0
	Southern Europe	0		Portuguese	0
	Latin America	51		Russian	0
	South America	2		Greater China	6
	Central America	1		Greater India	1
	Middle East	5		CIS	3
	Middle and Near East	19		North Africa	1
	Oceania	65		French Island	1
	Africa	19	Total		518

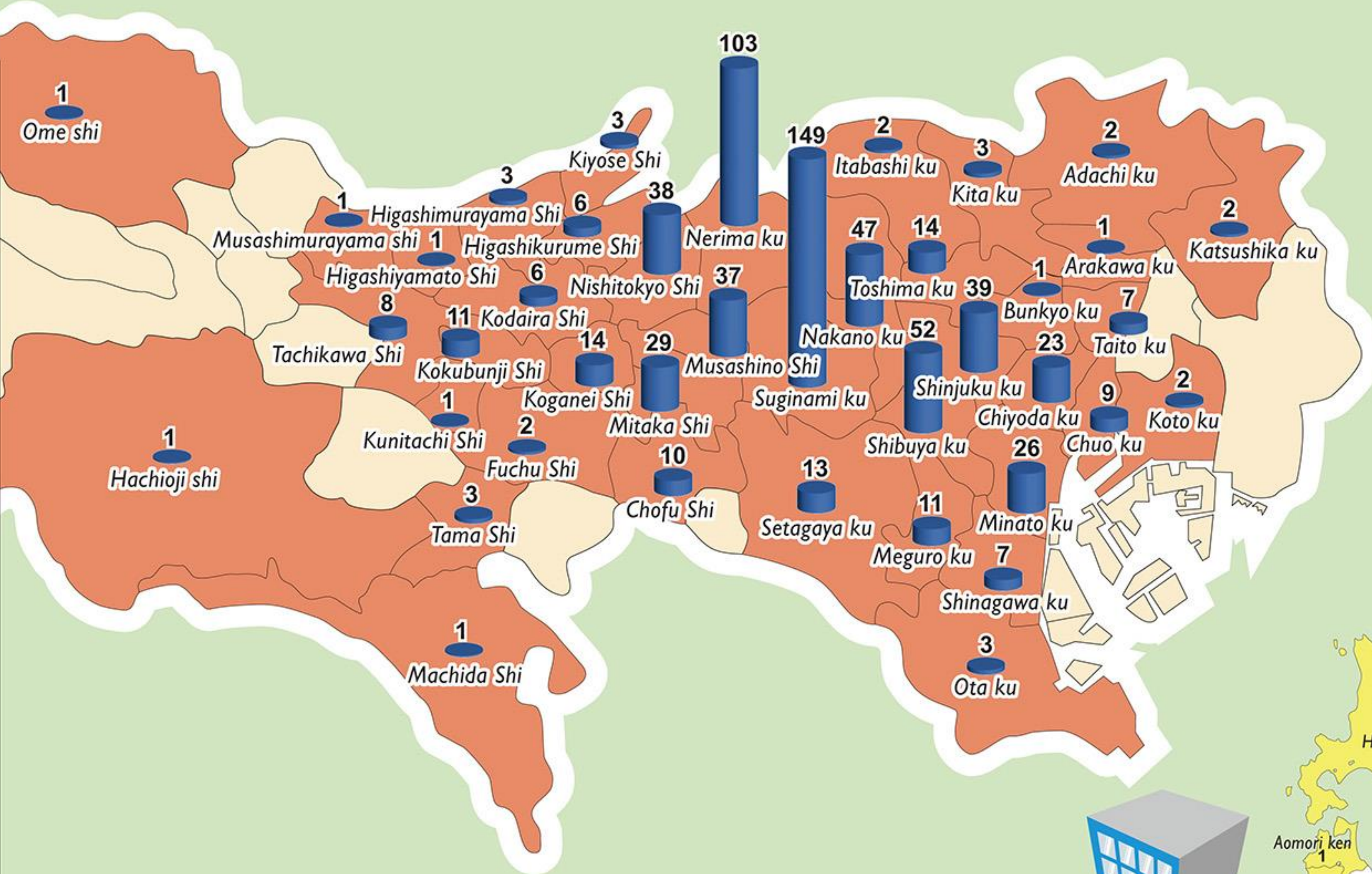
Chart-4

Distribution of Japanese animation studios (2020 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.
＊Headquarters locations are listed, other studios are not included.

The Distribution of Anime Production Studios in Tokyo

In 2020, there were a total of 811 companies involved in anime production (planning/production, script, direction, key animation, in-betweens, CG (2D and 3D), coloring, backgrounds/art, special effects, filming, editing, and other parts of the production process). This is 189 companies more than the survey done in 2016 (622 companies) and 392 companies more than 2011 (419 companies). 692 companies, or 85.3% of the total, were in Tokyo, but this is a reduction from 87.3% in 2011 and 87.1% in 2016. Regarding the locations of the studios, 149 companies are in Suginami-ku, 103 in Nerima-ku, 52 in Shibuya-ku, and 47 in Nakano-ku, so it is clear that anime production companies are concentrated in the Suginami and Nerima areas. The three original anime production companies, Toei Doga (now Toei Animation), the original Mushi Production, Tatsunoko Production (now Tatsunoko Pro), along with Tokyo Movie (Now TMS Entertainment), have been in existence since the beginning of TV anime history. These companies were established along the Seibu Ikebukuro Line, the Seibu Shinjuku Line, and the Chuo Line, resulting in anime production companies gathering in the Suginami and Nerima areas of west Tokyo. On the other hand, CG companies are growing in number in Shibuya-ku, so as processes that were once hand-drawn are increasingly being done with CG, companies that mostly did CG production for other industries like video games, live films, and amusement establishments are now participating in anime production. Thus, more CG companies connected to anime companies are being established, and they are being located in the urban subcenter of Shibuya-ku.



Anime Production Continues to Move Out of Tokyo

The heavy concentration of anime production companies in Tokyo is receding slightly as some are beginning to leave the city. One of the reasons is the goal of each company to hire more human resources. One of the chronic problems of anime production is the lack of human resources, and one of the causes is that the industrial structure of having companies concentrated in Tokyo made it difficult for people outside of Tokyo to find employment in the industry. However, in recent years, many anime production companies are being established outside of Tokyo and often link up with regional educational facilities to teach students and offer employment opportunities. Because of that, there is now the option for students to find work at an anime production company in their local region.

Also, the digitalization of the production processes is also a crucial reason for anime production companies moving outside Tokyo. Until the 2000s, TV anime was delivered to the networks via tape. The networks were located in Tokyo, so being in Tokyo was a requirement. However, now that processes including delivery have become digitized, there is no need to be situated in Tokyo. These calculations don't include any studios other than the head office, but regional art studios specializing in digital art are increasing in number, and even more CG studios are also being established outside of Tokyo. It can be assumed that as digitalization continues, anime production companies will also continue to be based outside of Tokyo.

Based on the survey by the Association of Japanese Animations

The 2021 Anime Market Reached 2.74 Trillion Yen, 113.3% of the Previous Year; The Market Returns to Growth After Limiting the Influence of COVID-19 to One Year

Anime Industry Report 2022

The 2021 anime market reached earnings of 2.74 trillion yen, 113.3% of the previous year. It has recovered from the recession caused by the COVID-19 pandemic, and each field in the market has increased from the previous year. Compared to 2019, the four genres of Video, Streaming, Merchandising, and International exceeded 2019's numbers, but all other genres are still on their way to recover.

We hope this information will be useful to your business in the anime industry.

■Outline

【Title】	Anime Industry Report 2022
【Publisher】	The Association of Japanese Animations
【Release day】	November 11, 2022
【Size/Pages】	A4 / 124P (Report), + 4 chart sheets inserted+ All Animation Works Perfect Data(Online)
【Price】	11,000 yen (tax excluded)

【Index】

1.Overview of the Japanese animation industry in 2021

*Overall market trends and notable trends of the industry

2.Trends in respective media

*Animation distribution market (TV animation, theatrical animation, videogram, Internet distribution), secondary use (including merchandising), advertisement/promotion, music, and live entertainment

3.Trends in the overseas market

*Japanese animations in the global market

4.Special Texts

* Influence of the progress of technology on the anime industry

（Electronic Edition） Materials, All Animation Works Perfect Data *TV, Theatrical, and OVA

Chart: Trends in the Japanese Animation Market, Recent Movements of the Japanese Animation Industry and Market, Development of Japanese Animation in the Overseas Market, Distribution Map of Japanese Animation Studios

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The Association of Japanese Animations Address:Haimu Ochanomizu 4F, 3-4-5,Hongo,Bunkyo-ku,Tokyo
URL: https://aja.gr.jp/ E-mail: collabo@aja.gr.jp Phone: +81-3-5839-2930 Fax: +81-3-5839-2931