Anime Industry Report 2023

Summary

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The Association of Japanese Animations

The Trends of Rapid Economic Growth That Have Continued Since the Mid-2010s Have Been Made Evident

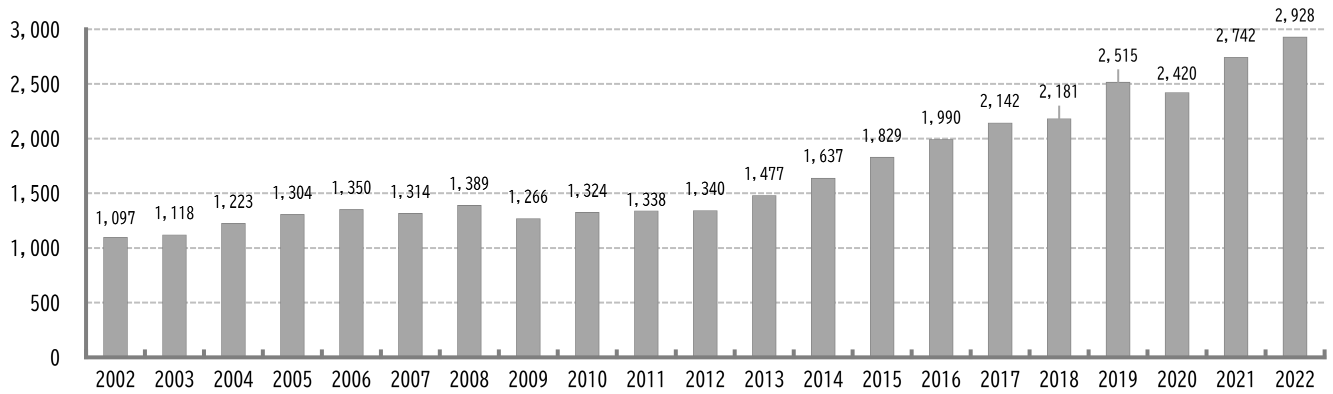
2021 saw a comeback after the direct attack from the COVID-19 pandemic in 2020, and 2022 showed even further growth. The trends behind the rapid economic growth that have continued since 2010 have been made evident. If we consider 2020 to be an accident caused by the COVID-19 pandemic, it is otherwise true that for the past 13 years, the industry has continued to break its previous highest records annually. The past few years have seen a deceleration of the growth speed of the international market, so now our industry must focus on how long this growth can continue.

Trends in the Anime Industry Market (2022)

〈The anime industry market continues to grow even after the COVID-19 pandemic, reaching 106.8% of the previous year at 2.9 trillion yen〉

The anime industry market in 2022 reached 106.8% of the previous year, which had then been the highest on record, with a 185.5 billion yen increase to 2.9 trillion yen for a new record. If we remove 2020 as an exception because of the direct hit the industry took from the COVID-19 pandemic, the market has continued to expand since the 2010s. Compared to when the first calculations of the market were taken in 2002, the scale has grown by 2.67 times. From the growth period of the early 2000s to the slump of the 2010s (2002 - 2012), where the market grew 122% over 11 years, the expansion period (2013-2022) has seen a growth of 198% over ten years. Japanese anime possesses true potential especially in the international market, which has led to more recognition that this growth will continue.

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



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

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

Item	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	YoY
①TV	102.7	111.6	107.3	105.6	106.1	113.7	94.8	84.0	90.6	94.3	104.1%
②Movie	47.0	41.7	47.7	66.3	41.0	42.6	69.2	55.4	60.2	78.5	130.4%
③Video	115.3	102.1	92.8	78.8	76.5	58.7	56.3	46.6	66.2	38.5	58.2%
④Internet Distribution	34.0	40.8	43.7	47.8	54.0	59.5	68.5	93.0	154.3	165.2	107.1%
⑤Merchandising	598.5	655.2	579.4	552.2	503.7	500.3	586.8	581.9	663.1	669.3	100.9%
⑥Music	29.6	29.2	32.4	36.9	34.4	35.8	33.7	27.6	31.7	27.4	86.4%
⑦Overseas	282.3	326.6	583.4	767.7	994.8	1009.2	1200.9	1239.4	1313.4	1459.2	111.1%
⑧The Pachinko and the like	242.7	298.1	294.1	281.8	268.7	283.5	319.9	263.0	305.6	298.1	97.5%
⑨Live Entertainment	24.8	31.8	48.4	53.2	62.9	77.4	84.4	29.0	57.1	97.2	170.2%
Total	1476.9	1637.1	1829.2	1990.3	2142.1	2180.7	2514.5	2419.9	2742.2	2927.7	106.8%

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

Thinking of the Primary Factors Driving the 2022 Market

〈The main factors that made 2022 the highest grossing year so far are International, Live Entertainment, and Movie〉

The Japanese anime industry market has reached almost 3 trillion yen. The market was 1.09 trillion yen in 2002 and finally broke 2 trillion yen fifteen years later in 2017, yet it is reaching 3 trillion yen in just five years. The driving force behind that is the international market. It rose 145.8 billion yen compared to 2022, which is on a different scale from the increases of the next most-grossing markets: 40 billion yen of Live Entertainment, 18.3 billion yen of Movie, and 10.9 billion yen of Streaming.

The Live Entertainment market is the next one to focus on after the international market. It became a new anime window in 2013 and the market has expanded by 10 billion yen each year, but it was dealt a devastating blow in 2020 with the COVID-19 pandemic. It instantly dropped to just 29 billion yen and there were worries about its future, but it recovered in 2021 with 57.1 billion yen. After the pandemic restrictions were lifted in 2022, so many concert events and 2.5 musicals were held that it was like a dam broke. The genre grew to 97.2 billion yen, surpassing Television.

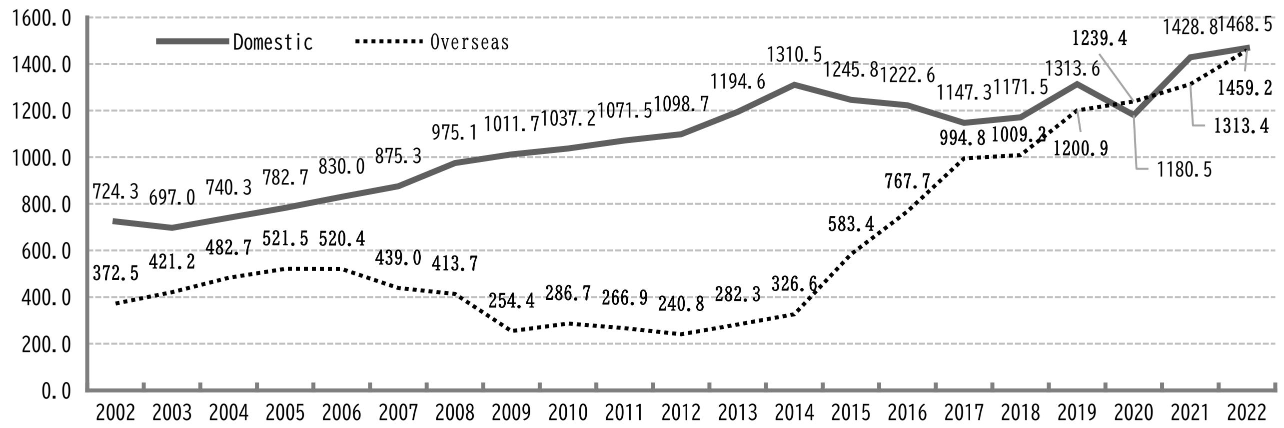
〈Has Streaming Media Reached Its Peak?〉

Streaming Media began expanding in the 2010s. In 2019, the 68.5 billion yen market doubled to 154.3 billion yen in 2021, but it began showing signs of slowing down in 2022 at 165.2 billion yen. The global platforms Netflix and Disney+ saw a slowing of paid members from 2022 to 2023, and it cannot be denied that similar signs are being seen in Japan. However, when it comes to streaming, there are no new ways to circulate the media, so it has a longer lifetime than Video.

〈Regarding the International and Domestic Markets〉

As stated before, the primary factor in the growth of the anime industry in 2022 was the international market. It was thought that the domestic and international market would reverse for the first time in two years, but the domestic market exceeded the international market by 9.3 billion yen, only 0.6%, due to the contribution of fields like Live Entertainment. The international market takes up half of the overall profit through a wide-ranging number of fields like Television, Movie, Video, Streaming, Merchandising, Game Licensing, and more. It is reassuring for Japan that this market has continued to grow since the mid-2010s. The May 27, 2023 issue of Weekly Toyo Keizai had a feature called "Anime: The Mechanisms Behind the Passion," where they stated that "the market has more than doubled in ten years! A rare growth industry has burst onto the scene." However, their point was, "We can expect a ripple effect as international expansion continues to see good results as this is an industry that will likely continue to grow, something rare in Japan right now." That same feature alludes to the anime industry's potential. Mr. Atsuo Nakayama, a sociologist specializing in entertainment studies, believes that when we look at how the international gaming software market grew to be four times the domestic market, the anime industry will also likely have an international market four times the size of the domestic market and can be expected to reach a market scale of 5 trillion yen. Akira Ishii, the CEO of REMOW, believes that the demand for anime means that the global market should be at a scale of 34 trillion yen.

[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

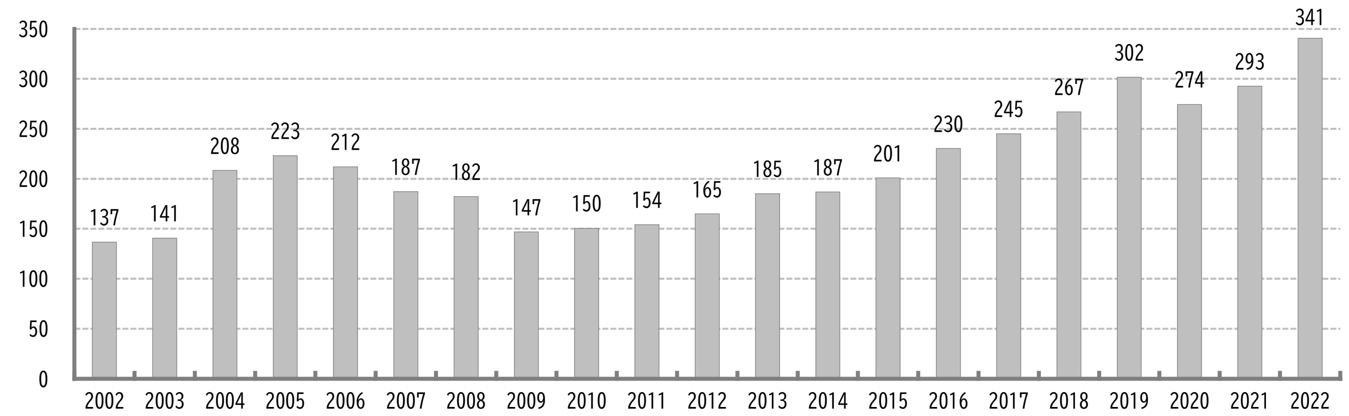
〈The Unusual Events in Hollywood Animation and Japan's Great Advances〉

Hollywood Animation has been suffering some unusual changes since the COVID-19 pandemic. 2022's Strange World only grossed $37 million in the North American box office, and in 2023, Disney's 100th anniversary film Wish stopped at $606 million (as of the end of 2023). The fall of Disney (including Pixar) is striking. On the other hand, The Super Mario Bros. Movie by Nintendo and Illumination took #2 in the 2023 North American box office, followed by Sony Pictures Animation's Spiderman: Across the Spiderverse at #3. Those companies knocked Disney and Pixar off the top. Also, 2021's Demon Slayer: Kimetsu no Yaiba - The Movie: Mugen Train, 2022's Dragon Ball Super: Super Hero and Jujutsu Kaisen 0, and 2023's The Boy and the Heron were all Japanese anime movies that took number one in the weekly North American box office charts. All of those movies were also popular across various Asian countries and rewrote the global anime world map.

〈The 2022 Anime Industry Market (The Narrow Anime Market/Production Companies' Profits)〉

The industry market is actually the profits and market of the studios producing the anime, which is how the financial situation of the "anime industry" comes forth. However, each studio's revenue structure differs drastically due to factors like whether there is financing for the production, whether they are the coordinators of the production committee, and whether they have the right to be the sales window within the committee. Even so, it is Television that is continuing to support the studios. Television's 77 billion yen make it #2 (22.6%) of the market when split by genres, which is an increase of 106.9% since 2019, and we can conjecture that much of it are production costs for TV series. TV anime are still the "staple food" of the anime industry. International, which is the #1 genre with a share of 25.1% of 86 billion yen, is up 103.5% from last year and 119.2% up from 2019. Merchandising, which is #3 with a share of 67 billion (19.6%) is also showing favorable growth with an increase of 118.4% from 2019. Streaming is #4 with a 10.2% share of 34 billion yen, up 160.6% from 2019. It is expected that Streaming will be a constant source of income for the anime industry the way Video once was. The 5th share of the market was Movie at 8.8%, 30 billion, which is up 131.4% from last year and 77.6% from 2019. #6, Entertainment, takes 5.8% of the share at 19 billion and is up 111.2% since 2019. 2019 had been considered its peak and its share was declining, but in 2022 it made a comeback. The 7th genre was Other, with 3.8% at 12 billion, 8th was Video with 5.3 billion and 1.6% of the market, and 9th was Live Entertainment, with 1.4% of the market at 4.9 billion yen.

[Figure 4] The Japanese Animation Market in a Narrow Sense (Yen in billions)



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

Item	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	YoY
①TV	67.4	61.7	60.5	65.7	68.9	76.5	72.1	65.5	70.9	77.1	108.7%
②Movie	24.8	22.6	23.1	25.2	29.3	34.1	38.8	26.8	22.9	30.1	131.4%
③Video	15.5	16.1	14.4	12.4	11.6	8.0	7.5	7.1	5.0	5.3	106.0%
④Internet Distribution	8.5	10.2	11.0	12.0	13.6	14.7	21.6	19.1	24.9	34.7	139.4%
⑤Merchandising	26.5	26.6	25.8	30.4	34.5	42.5	56.4	53.4	52.5	66.8	127.2%
⑥Music	3.6	3.6	4.0	4.5	4.2	4.4	4.1	3.4	3.9	3.4	87.2%
⑦Overseas	16.9	19.5	34.8	45.8	52.4	60.3	71.8	76.1	82.7	85.6	103.5%
⑧The Pachinko and the like	11.6	14.2	13.9	13.3	13.4	15.1	17.9	15.3	16.9	19.9	117.8%
⑨Live Entertainment	1.2	1.6	2.4	2.7	3.1	3.9	4.2	1.5	2.9	4.9	169.0%
⑩Others	9.1	10.7	11.0	18.3	14.1	7.5	7.2	6.2	10.1	12.9	127.7%
Total	185.1	186.8	200.9	230.3	245.1	267.0	301.6	274.4	292.7	340.7	116.4%

Based on questionnaires conducted by the Association of Japanese Animations

〈A Business Model Supporting Rising Production Fees〉

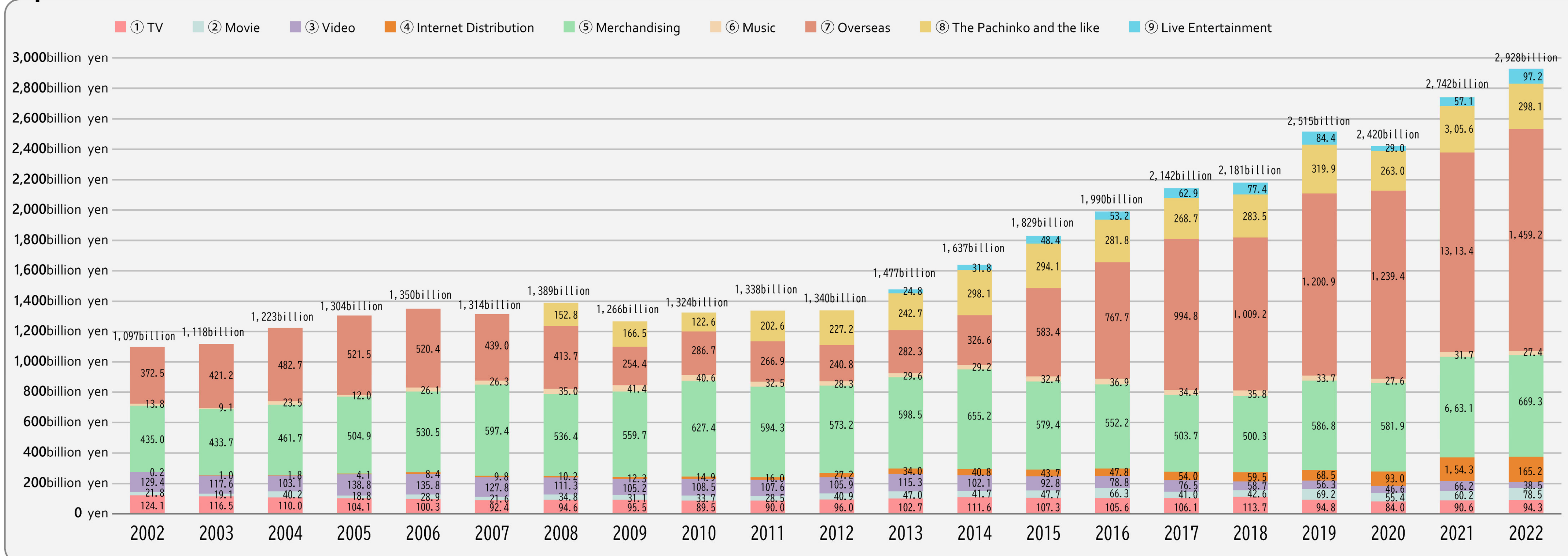
It has been evident over the past few years that anime production fees have been rising, but there is a business model being established to recoup some of those fees wherein a streaming platform is given the rights for early release. If it is a series, the designated platform streams it exclusively at first. After a specific holding period, it is broadcast in other fields such as TV before being available on streaming once again. That is the business model spearheaded by production committees. The designated streaming platform gets the early streaming license of the series with the goal of recouping some of the production fees. After that, the broadcast and secondary streaming, merchandising, live entertainment, and international sales will expand profits. While it depends on the hype of the series itself, this model is one of the pillars sustaining the increasing production costs.

Chart-1

Trends in Japanese Animation Market (2023version)

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 – 2022〉



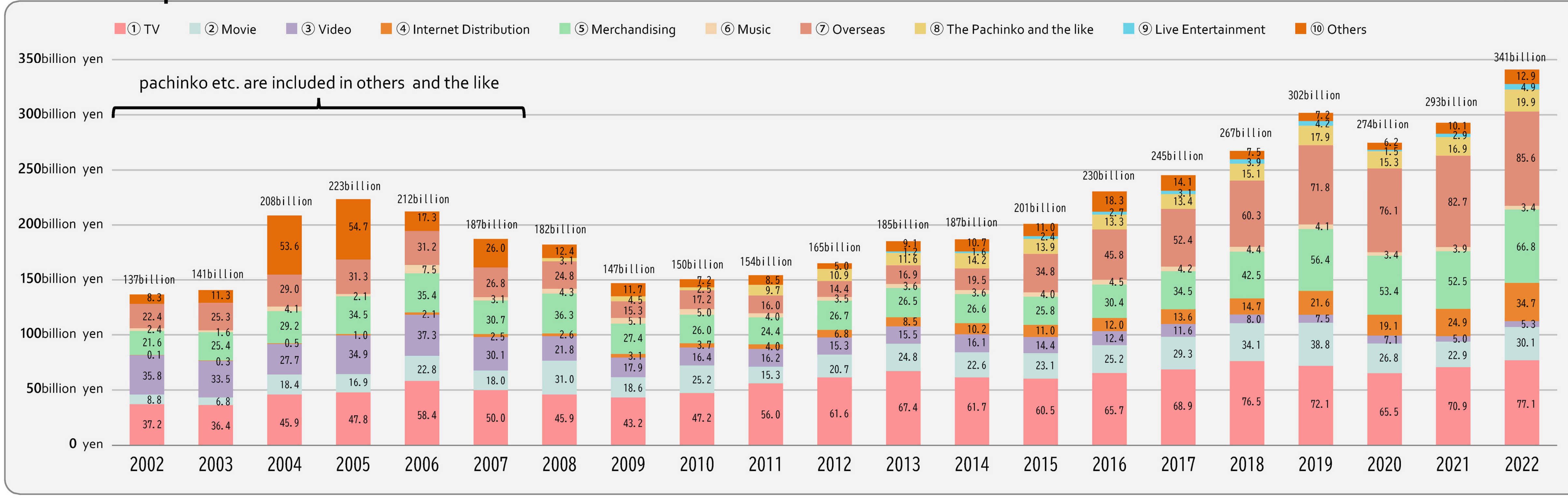
Definition of each item (end-user basis)

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 – 2022〉



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 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 (2023 version)

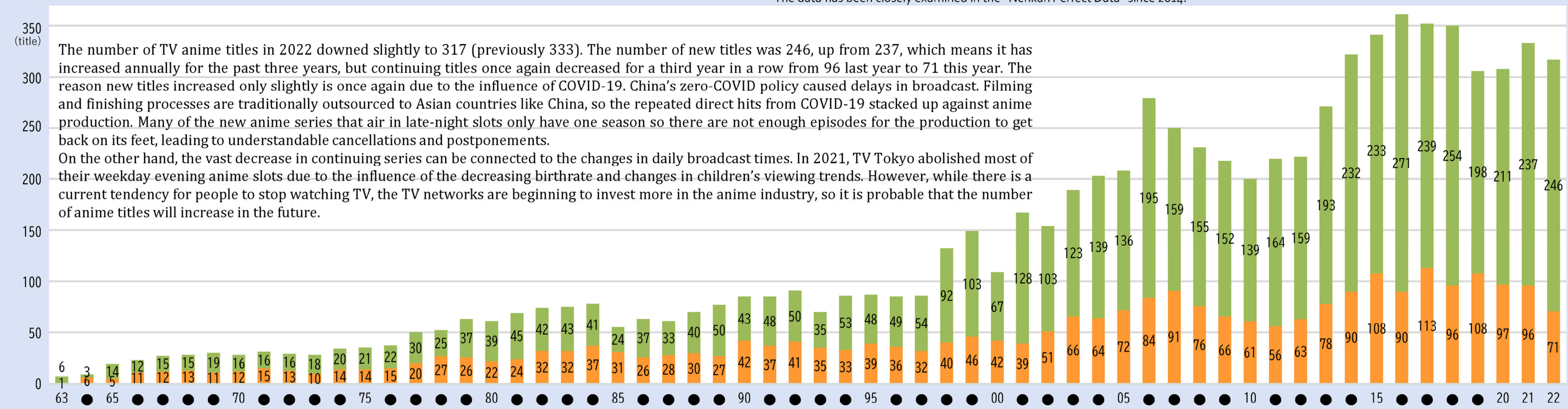
Each Field Constructing the Anime Industry, Which Continues to Break Records and is Reaching a Market of 3 Trillion Yen

TV Animation programs (1963-2022)

The Continuing Influence of COVID-19 and The Structural Change of Daily Broadcasts is Limited to a Slight Increase

The number of TV anime titles in 2022 downed slightly to 317 (previously 333). The number of new titles was 246, up from 237, which means it has increased annually for the past three years, but continuing titles once again decreased for a third year in a row from 96 last year to 71 this year. The reason new titles increased only slightly is once again due to the influence of COVID-19. China's zero-COVID policy caused delays in broadcast. Filming and finishing processes are traditionally outsourced to Asian countries like China, so the repeated direct hits from COVID-19 stacked up against anime production. Many of the new anime series that air in late-night slots only have one season so there are not enough episodes for the production to get back on its feet, leading to understandable cancellations and postponements.

On the other hand, the vast decrease in continuing series can be connected to the changes in daily broadcast times. In 2021, TV Tokyo abolished most of their weekday evening anime slots due to the influence of the decreasing birthrate and changes in children's viewing trends. However, while there is a current tendency for people to stop watching TV, the TV networks are beginning to invest more in the anime industry, so it is probable that the number of anime titles will increase in the future.

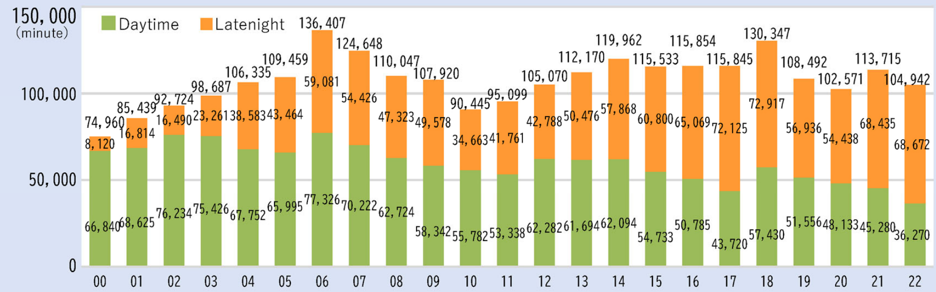


Based on a survey conducted by the Association of Japanese Animations

Production Minutes of TV Animations (2000-2022)

Daily Broadcast Slots Decreased Drastically and Late-Night Broadcasts were Postponed, Leading to Only Slight Increases

In 2022, the number of TV anime production minutes was only 92.3% of the year before at 104,942 minutes, down from 113,715. Late-night anime increased slightly to 68,672 (up 100.3% from last year), but the overall production minutes drastically decreased to 36,627 (80.1% of the previous year). The rapid increase in late-night slots in 2021 means that the total production minutes increased, but since the late-night slots increased only marginally in 2022, it could not cover the decrease in overall minutes. Even if the production numbers are split between new and continuing series, 2022 saw a decrease. The repeated waves of COVID-19 in China in 2022 influenced the anime industry through the cancellations and postponements of late-night and new anime broadcasts, so there is a possibility that those postponed minutes will be carried over into 2023 and be connected to an improvement in those numbers.

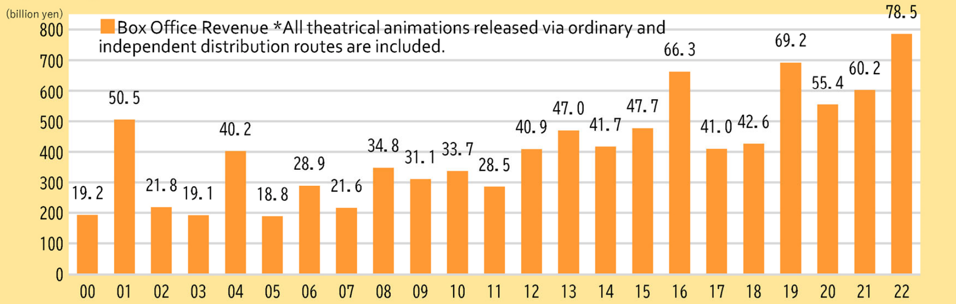


Based on a survey conducted by the Association of Japanese Animations

Box Office Revenue of Theatrical Animations (2000-2022)

Successive Hits Broke Historical Records with Five Titles Occupying 70% of the Profits

In 2022, the anime movie box-office revenue reached 78 billion, 130.4% of the year before and surpassing 2019's 69 billion yen for a record high. The biggest hit ONE PIECE FILM RED reached 18 billion yen (19 billion yen as of the end of August 2023). Suzume grossed 11 billion yen (final box office was 13 billion yen), Detective Conan: The Bride of Halloween reached 9.8 billion, 2021's Jujutsu Kaisen 0's 2022 box-office revenue was 8 billion (for a final total of 13 billion), and THE FIRST SLAM DUNK grossed 6 billion (with a final total of 14 billion). These five movies grossed a total of 54 billion yen. Four of these movies remained in the box office over the new year, from 2021-2022 and from 2022-2023, and grossed final profits way over 10 billion yen. They reveal the strength that long-running movies have in gathering audiences.

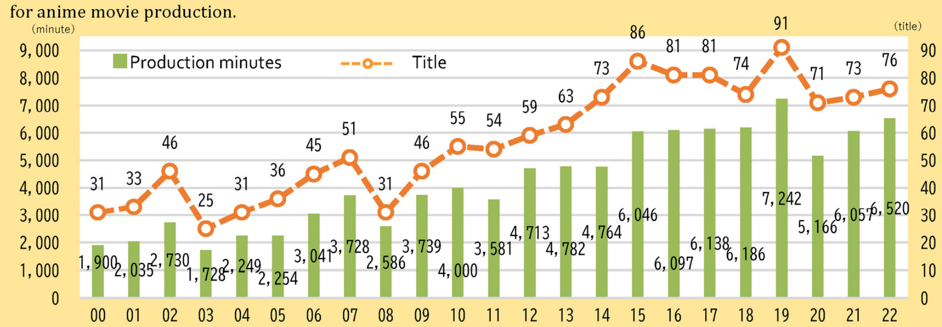


Source: The Association of Japanese Animations, based on the data by Motion Picture Producers Association of Japan/Kinema Jumpo/Bukatsushinsha(Data edited by Mindbase Inc. from 2000 to 2008 and by the Association of Japanese Animations from 2009 to 2022)

The Number of Theatrical Animation Works and the Production Minutes (2000-2022)

The Trend of Production Numbers Remaining High Comes from the Production Inclination of a Secondary Development in Streaming

The number of anime movie production minutes in 2022 was 6,520 (up from 6,057 the previous year) with 76 titles produced (up from 73). In the 2000s, the number of anime titles released everywhere was between 20-50, but since 2015, the high standard of 70-90 a year has been maintained. The continuation of anime movie production also raises revenue from TV broadcasting rights, videogramming rights, international sales, and streaming rights. In recent years, thanks to the vigorous development of streaming rights, adding conditions such as only allowing movies to be streamed on a single platform means those platforms are investing greatly in the movies. These secondary developments have a stronger trend in anime movies over live-action, leading to a favorable circumstance for anime movie production.

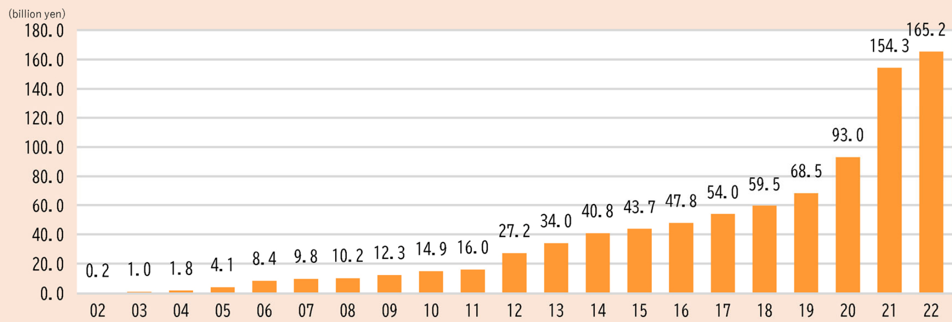


Based on the survey conducted by the Association of Japanese Animations

Animation Distribution via the Internet (2002-2022)

Looking for the Next Key for Anime Streaming Now That Government Requests for People to Stay at Home Have Ended

In 2022, the domestic anime streaming market grossed 165 billion yen, 107.1% of the previous year. With the COVID-19 pandemic and resulting emergency demands for people to stay at home, the double-digit increase in the profit scale since 2021 has settled down. The rapid increase in streaming overtook the TV market in 2021 and has become the main method for anime watching, but the domestic market will hit its maximum limit soon. The time to come up with a new business model is approaching. Titles made for streaming have different tempos and lavishness from TV anime as well as a degree of freedom that can be used to test new types of media mixes, so those kinds of experiments will be the key to create the next step.



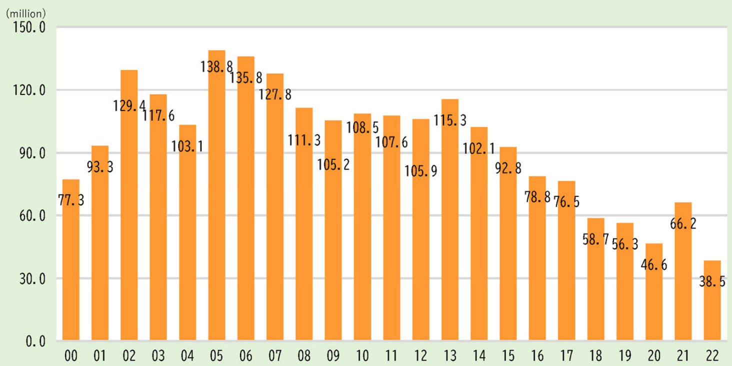
Based on a survey conducted by the Association of Japanese Animations

Animation videograms (2000-2022)

※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.

Last Year's Rebound Caused a Drastic Decrease Within the Return to a Declining Tendency

In 2022, the anime video packaging market grossed 38 billion yen, 58.2% of the previous year. It is a drastic decrease after the sudden increase in 2021. Generally, there is a tendency for a decrease in video packaging as streaming increases. As the role of video packaging decreases, the problem of being unable to watch series when titles are deleted from streaming media remains, so packaged media continues to have the value of "possessing the footage." It is believed that video packaging will continue maintaining a fixed percentage of the anime market due to core fans.



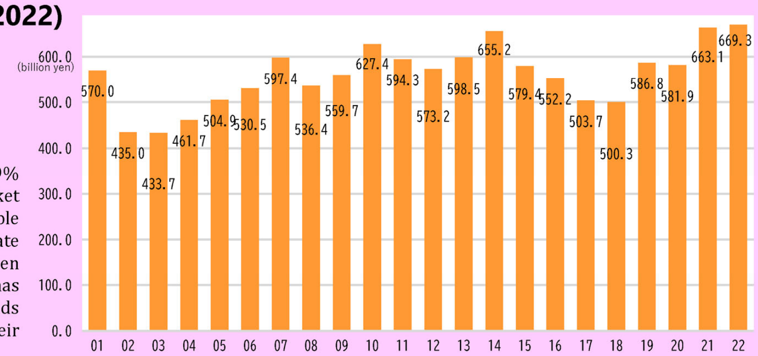
Based on a report by Japan Video Software Association

Merchandising Related to Animation (2000-2022)

※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.

Diverse Characters Make Up the Market as Consumption Swings Back to Real Life Instead of Digital

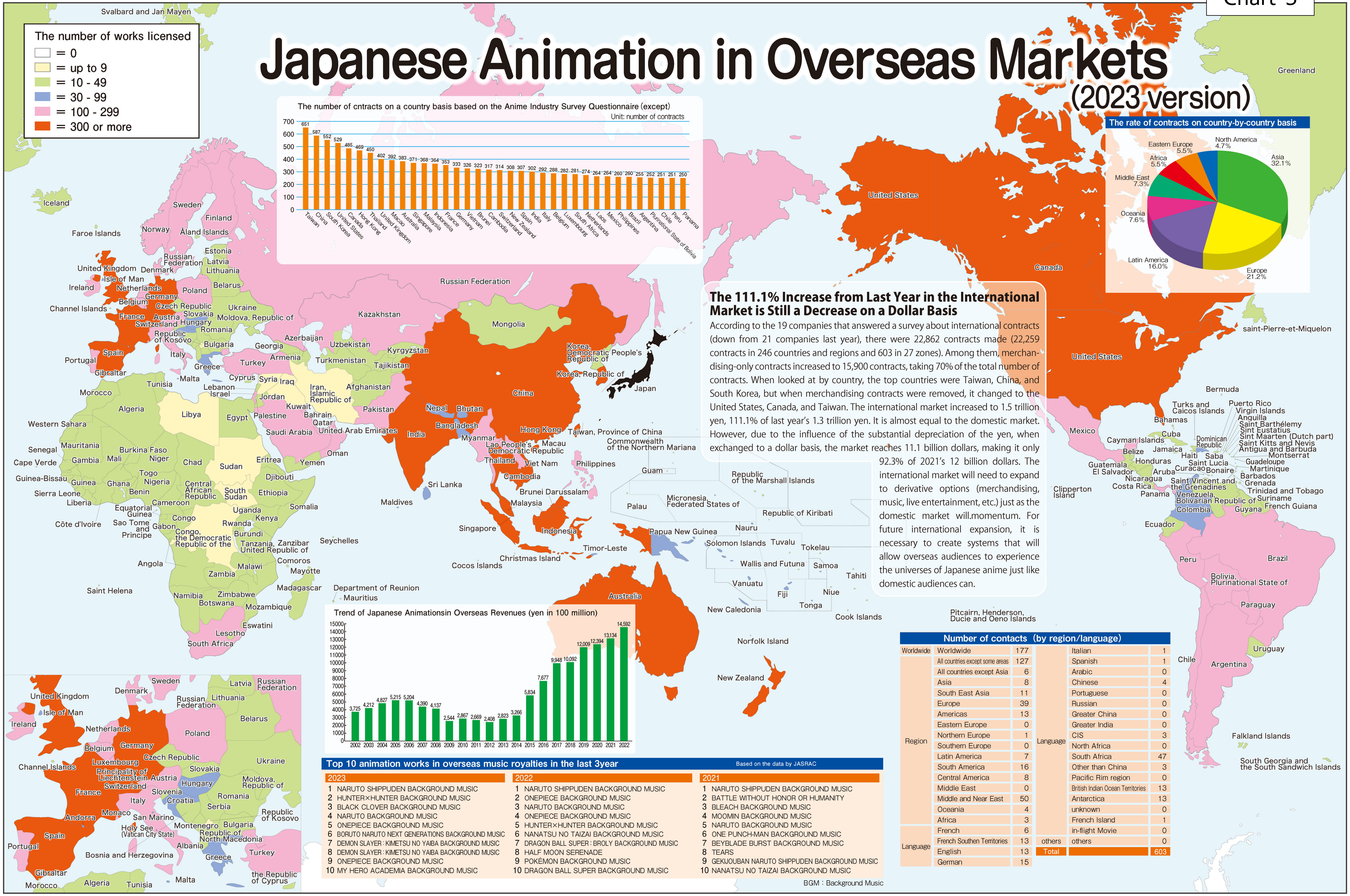
Japan's anime character merchandising market reached 669 billion yen in 2022, 100.9% of the previous year. Various characters from different kinds of media like Pocket Monsters, Chiikawa, ONE PIECE, SPY x FAMILY, and Detective Conan kept the favorable progress up in 2022. Events, pop-up shops, and character cafes set up to commemorate the release of anime movies saw vigorous sales of character merchandise. It can be seen that a return to real-life sales over digital is happening. The character target base has expanded from core fans to kids and families, and the continuation of long-lasting kids and family anime such as Pocket Monsters and Detective Conan means that their demographics have spread to older fans.



Calculated by the Association of Japanese Animations based on the data from "CharaBiz DATA" (2001-2022)

Chart-3

Japanese Animation in Overseas Markets
(2023 version)



The 111.1% Increase from Last Year in the International Market is Still a Decrease on a Dollar Basis

According to the 19 companies that answered a survey about international contracts (down from 21 companies last year), there were 22,862 contracts made (22,259 contracts in 246 countries and regions and 603 in 27 zones). Among them, merchandising-only contracts increased to 15,900 contracts, taking 70% of the total number of contracts. When looked at by country, the top countries were Taiwan, China, and South Korea, but when merchandising contracts were removed, it changed to the United States, Canada, and Taiwan. The international market increased to 1.5 trillion yen, 111.1% of last year's 1.3 trillion yen. It is almost equal to the domestic market. However, due to the influence of the substantial depreciation of the yen, when exchanged to a dollar basis, the market reaches 11.1 billion dollars, making it only 92.3% of 2021's 12 billion dollars. The international market will need to expand to derivative options (merchandising, music, live entertainment, etc.) just as the domestic market will.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.

Trend of Japanese Animationsin Overseas Revenues (yen in 100 million)

2002	3,725
2003	4,212
2004	4,827
2005	5,215
2006	5,204
2007	4,390
2008	4,137
2009	2,544
2010	2,867
2011	2,669
2012	2,408
2013	2,823
2014	3,266
2015	5,834
2016	7,677
2017	9,948
2018	10,092
2019	12,009
2020	12,394
2021	13,134
2022	14,592

Number of contacts (by region/language)

Worldwide	Worldwide	177	Language	Italian	1
Region	All countries except some areas	127		Spanish	1
	All countries except Asia	6		Arabic	0
	Asia	8		Chinese	4
	South East Asia	11		Portuguese	0
	Europe	39		Russian	0
	Americas	13		Greater China	0
	Eastern Europe	0		Greater India	0
	Northern Europe	1		CIS	3
	Southern Europe	0		North Africa	0
	Latin America	7		South Africa	47
	South America	16		Other than China	3
	Central America	8		Pacific Rim region	0
	Middle East	0		British Indian Ocean Territories	13
	Middle and Near East	50		Antarctica	13
	Oceania	4		unknown	0
	Africa	3		French Island	1
Language	French	6		in-flight Movie	0
	French Southen Territories	13	others	others	0
	English	13	Total		603
	German	15			

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

Based on the data by JASRAC

	2023	2022	2021
1	NARUTO SHIPPUDEN BACKGROUND MUSIC	NARUTO SHIPPUDEN BACKGROUND MUSIC	NARUTO SHIPPUDEN BACKGROUND MUSIC
2	HUNTER×HUNTER BACKGROUND MUSIC	ONEPIECE BACKGROUND MUSIC	BATTLE WITHOUT HONOR OR HUMANITY
3	BLACK CLOVER BACKGROUND MUSIC	NARUTO BACKGROUND MUSIC	BLEACH BACKGROUND MUSIC
4	NARUTO BACKGROUND MUSIC	ONEPIECE BACKGROUND MUSIC	MOOMIN BACKGROUND MUSIC
5	ONEPIECE BACKGROUND MUSIC	HUNTER×HUNTER BACKGROUND MUSIC	NARUTO BACKGROUND MUSIC
6	BORUTO NARUTO NEXT GENERATIONS BACKGROUND MUSIC	NANATSU NO TAIZAI BACKGROUND MUSIC	ONE PUNCH-MAN BACKGROUND MUSIC
7	DEMON SLAYER : KIMETSU NO YAIBA BACKGROUND MUSIC	DRAGON BALL SUPER : BROLY BACKGROUND MUSIC	BEYBLADE BURST BACKGROUND MUSIC
8	DEMON SLAYER : KIMETSU NO YAIBA BACKGROUND MUSIC	HALF MOON SERENADE	TEARS
9	ONEPIECE BACKGROUND MUSIC	POKÉMON BACKGROUND MUSIC	GEKIJOUBAN NARUTO SHIPPUDEN BACKGROUND MUSIC
10	MY HERO ACADEMIA BACKGROUND MUSIC	DRAGON BALL SUPER BACKGROUND MUSIC	NANATSU NO TAIZAI BACKGROUND MUSIC

BGM : Background Music

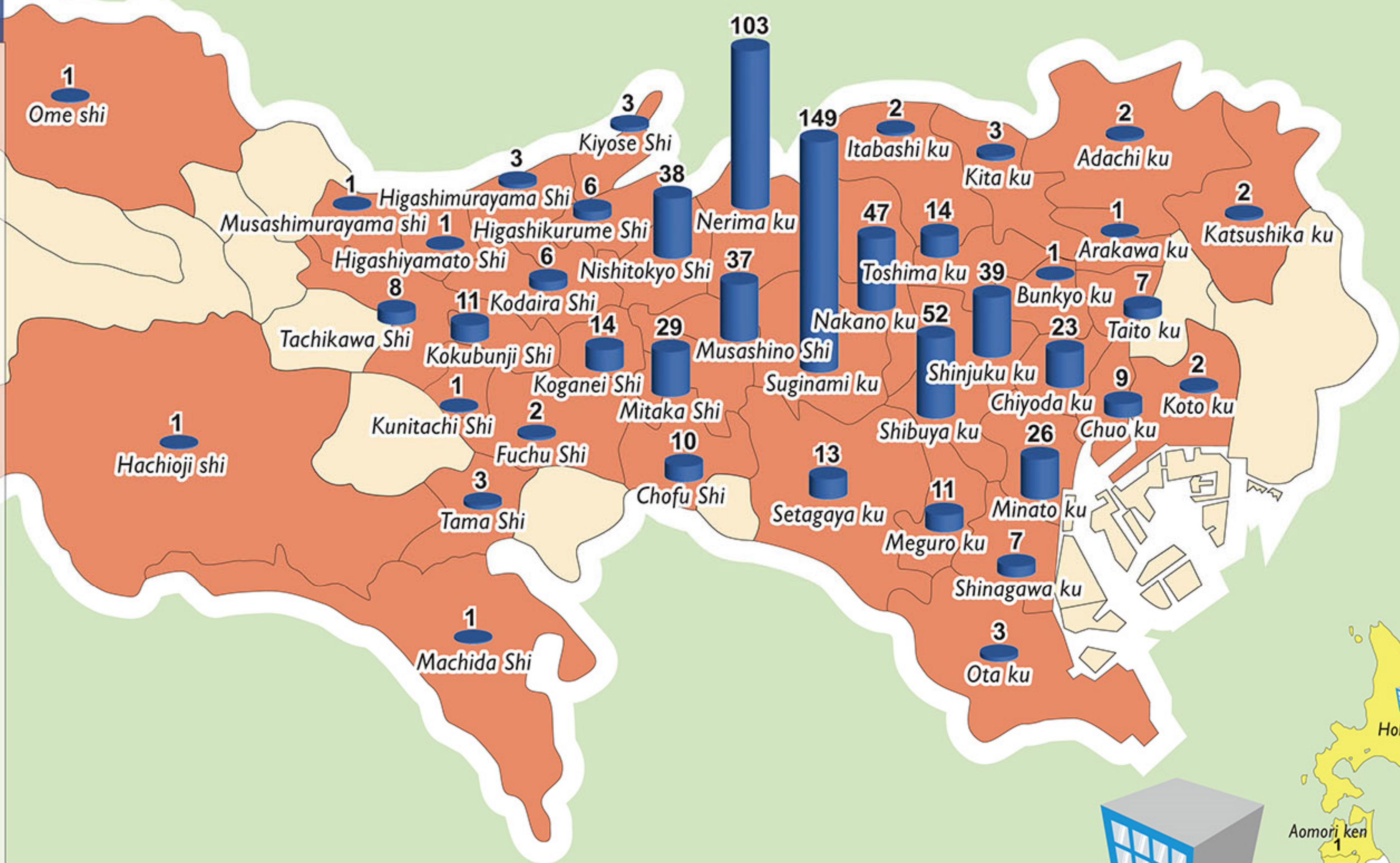
Chart-4

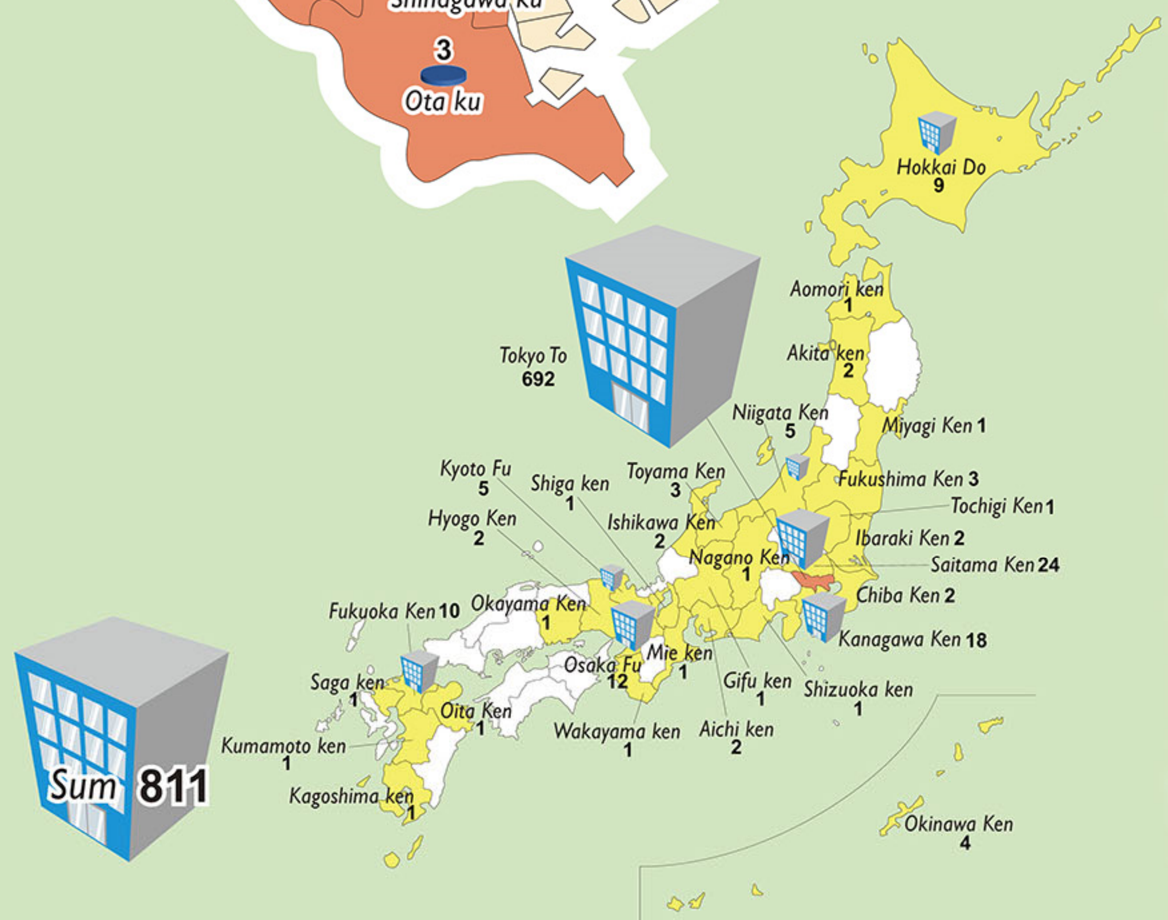
Distribution of Japanese animation studios (2020 version)

＊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 2022 Anime Industry Market Breaks Previous Records by Reaching 2.9 Trillion Yen, 106.8% of the Previous Year, After Recovering from the COVID-19 Pandemic; The Market Approaches 3 Trillion Yen

Anime Industry Report 2023

The 2022 anime industry market reached 2.9 trillion yen (106.8% of the previous year). It once again grew after the powerful comeback seen in 2021 after the COVID-19 pandemic hit in 2020. The international market which drives the industry reached 1.5 trillion yen (111.1%), taking 49.8% of the market share. #2 is Merchandising at 669 billion yen (100.9%) with 22.9% of the share. Following that is Entertainment at 298 billion yen (97.5%) with 10.2% of the share, Streaming at 162 billion yen (107.1%) with 5.6% of the share, Live Entertainment at 97.2 billion yen (170.2%) with 3.3% of the share, Television at 94.3 billion yen (104.1%) with 3.2% of the share, Movie with 78.5 billion yen (130.4%) with 2.7% of the share, Video at 38.5 billion yen (58.2%) with 1.3% of the share, and Music at 27.4 billion yen (86.4%) with 0.9% of the share.
We hope this information will be useful to your business in the anime industry.

■Outline

【Title】 Anime Industry Report 2023
【Publisher】 The Association of Japanese Animations
【Release day】 November 14, 2023
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【Index】

1.Overview of the Japanese animation industry in 2022
*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
*Production companies' countryside locations
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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