

# Anime Industry Report 2024

## Summary

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March, 2024

The Association of Japanese Animations

# The Market Greatly Exceeded 3 Trillion Yen in 2023, Breaking the Record High and Continuing the Unwavering Growth Trends

Excluding 2020, when the market fell into a slump due to the COVID-19 pandemic, the anime industry market has continued to break its own records since 2010.

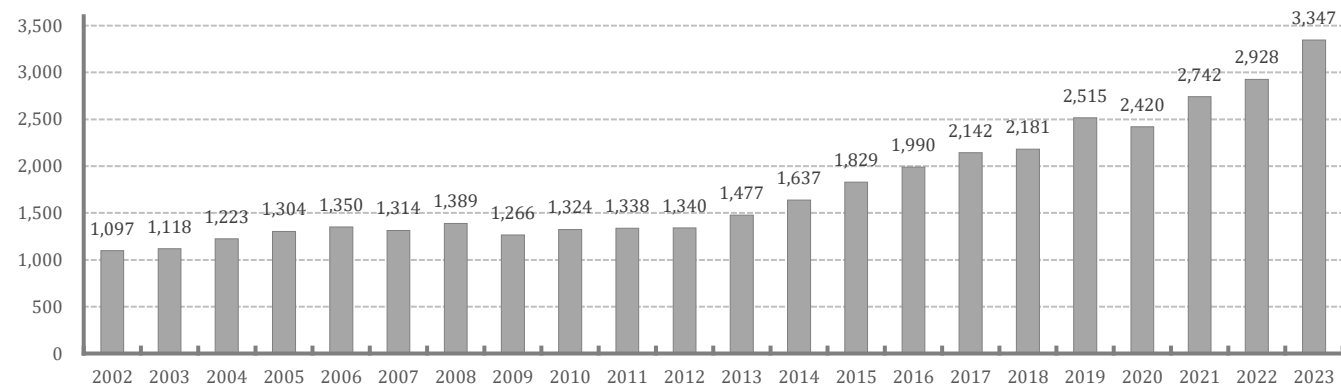
It is being supported by the firmly rooted domestic demand and the rapidly growing international market. It has gradually gained attention and has become the industry at the core of Japanese content exports, finally making the 2002 declaration of Japan becoming a nation of IP content a reality.

## Trends in the Anime Industry Market (2023)

〈The Anime Industry Market Greatly Exceeded 3 Trillion Yen, Reaching 114.3% of the Previous Year at 3 Trillion 465 Billion Yen〉

In 2023, the anime industry market once again broke its record high by reaching 114.3% of the previous year at 3.5 trillion yen, 418 billion yen more than the previous year. That growth rate and amount of increase is the highest ever. The anime industry market in 2002 was 1.96 trillion yen and it took 16 years to break 2 trillion yen in 2017, but this time it took only 7 years to break 3 trillion yen. It is proof that the market is still accelerating. These are the significant factors of the accelerated market, keeping in mind the circumstances of this growth.

[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	2017	2018	2019	2020	2021	2022	2023	YoY
①TV	106.1	113.7	94.8	84.0	90.6	94.3	97.3	103.18%
②Movie	41.0	42.6	69.2	55.4	60.2	78.5	68.1	86.75%
③Video	76.5	58.7	56.3	46.6	66.2	38.5	36.2	94.03%
④Internet Distribution	54.0	59.5	68.5	93.0	154.3	165.2	250.1	151.39%
⑤Merchandising	503.7	500.3	586.8	581.9	663.1	669.3	700.8	104.71%
⑥Music	34.4	35.8	33.7	27.6	31.7	27.4	26.7	97.45%
⑦Overseas	994.8	1,009.2	1,200.9	1,239.4	1,313.4	1,459.2	1,722.2	118.02%
⑧The Pachinko and the like	268.7	283.5	319.9	263.0	305.6	298.1	337.0	113.05%
⑨Live Entertainment	62.9	77.4	84.4	29.0	57.1	97.2	108.1	111.21%
Total	2,142.1	2,180.7	2,514.5	2,419.9	2,742.2	2,927.7	3,346.5	114.30%

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

## The Primary Factor Driving the 2023 Market

〈The Main Factors Driving the 2023 Market Were the International Market and the Streaming Market〉

In 2023, the anime industry market finally exceeded 3 trillion yen, and it was by a great amount. It increased by 418 billion yen, 114.3% of the previous year. The driving force behind that increase was the international market. The growth of the 2023 anime industry market when seen by genre is International in first, Streaming in 2nd, Entertainment in 3rd, Merchandising in 4th, Live Entertainment in 5th, and TV in 6th. However, when you total all six genres, International accounts for 60.9% of the growth. When added to the 19.6% growth of the 2nd category, Streaming, those two genres alone account for 80.5% of the growth.

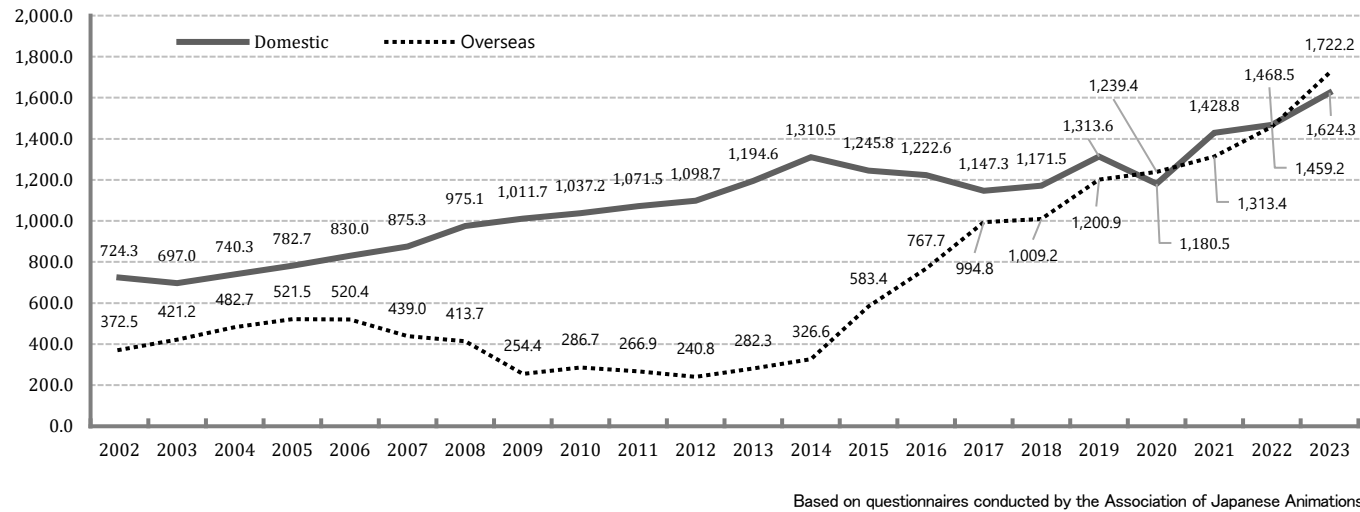
〈This Marks the Second Time the International Market Overtook the Domestic Market〉

In 2023, the international market overtook the domestic market. This is the second time in history this has happened. The first time happened in 2020, and it already seemed like the international market would exceed the domestic market. Domestically, there were the fixed ideas that the Japanese market would grow sluggish due to the declining birth rate and population decrease, but it exceeded the growing international market in 2021 and 2022 due to the COVID-19 pandemic. However, in 2023, the domestic market broke its own record for the third year in a row by reaching 1.6 trillion yen (110.6% of the previous year, which was an increase of 155.8 billion yen). That is because the domestic anime fan demographic is still full of passionate users even as they're aging. Yet the international market exceeded that domestic market in 2023. The international market broke its market scale for the 11th year in a row, reaching 1.7 trillion yen (118% of the previous year, which was an increase of 263 billion yen.) The difference between the two markets was only 97.9 billion yen, but as stated above, from the goal that the Japanese government aims for its content exports, the market reversals are regarded as important tipping points.

〈Anime as a Key Industry〉

On June 4, 2024, as part of their Intellectual Property Promotion Plan 2024, the Intellectual Property Strategy Headquarters announced their New Cool Japan Strategy in which content industries such as anime, manga, and video games were positioned as key industries. The New Cool Japan Strategy set the target figure of raising international content-related businesses to 20 trillion yen by 2033. The current international content market scale is 4.7 trillion yen (4.67 in 2022), of which anime accounts for 31% at 1.45 trillion yen. However, that ratio means it must reach roughly 6.2 trillion yen by 2033. The 2023 international market is 1.7 trillion yen, so there is a 4.78 trillion yen difference. In the ten years until 2033, the industry must grow by about 450 billion yen every year. Strategies must be put into place.

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



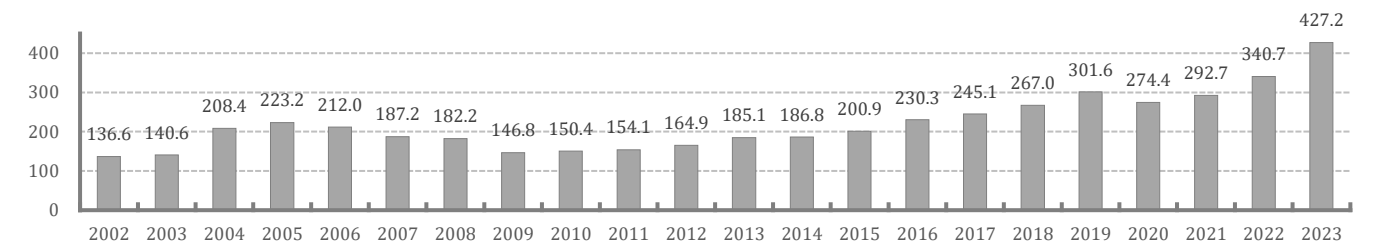
### 〈Explaining the 2023 Anime Industry Market〉

Of the 2023 anime industry market, the biggest growing amount was under Other, at 36.6 billion yen. In the mid-2000s, Entertainment-related profits (such as character licensing for game machines and producing videos for those game machines) were not separated into its own genre and were lumped into Other which led to that category reaching #1 in profits separated by genre. However, this time Other showed an unforeseen increase in profits due to the changes in industry genre classifications. The second highest-increase was in Merchandising rights at 28.8 billion yen. Financing series by the production committee system became mainstream in the 2000s, so in recent years there has been an increase in cases where studios have also invested and participated in splitting the profits. The ratio of International revenue, which is in third place, is a startling small number compared to the industry market. That's because in the industry market, the handling fees are relatively large for movies, TV, streaming, etc., so merchandising rights get paid on a royalty basis. TV, which is in fourth place, is the main source of revenue for production studios. Revenue from Merchandising, International, and Streaming tend to be concentrated in major studios who hold the rights to series, but almost all of the revenue from TV production and broadcasts are given to the studio. While it's a good thing for studios that production costs have been on an upward trend in recent years, it must be mentioned that the discussion over suitable prices has come up time and time again.

### 〈A Number of Discussions Regarding the Constantly Rising Production Costs〉

Over the past several years, the rising trend of the production costs has been unstoppable. On the surveys taken by studios, many studios brought up the trend in response to the question, "Within the anime business environment, what aspect of the revenue/business circumstances do you expect to most need revising?" At the same time, the reasons behind the rising costs are plenty, and the reasons for those rising costs listed as answers to the question, "Within the anime business environment, what aspect of the revenue/business circumstances do you expect to worsen?" cannot be overlooked. Some of those reasons include increase in labor costs and outsourcing fees due to a shortage of creators, the rising payments to overseas subcontractors due to the weak yen, the increase in running costs due to inflation, and the increase in investments and usage fees for maintaining a digital environment. As a result, it seems like the increasing trend will not change over the next few years.

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



Item	2017	2018	2019	2020	2021	2022	2023	前年比
①TV	68.9	76.5	72.1	65.5	70.9	77.1	91.0	118.0%
②Movie	29.3	34.1	38.8	26.8	22.9	30.1	23.2	77.1%
③Video	11.6	8.0	7.5	7.1	5.0	5.3	3.2	60.4%
④Internet Distribution	13.6	14.7	21.6	19.1	24.9	34.7	36.9	106.3%
⑤Merchandising	34.5	42.5	56.4	53.4	52.5	66.8	95.6	143.1%
⑥Music	4.2	4.4	4.1	3.4	3.9	3.4	3.3	97.1%
⑦Overseas	52.4	60.3	71.8	76.1	82.7	85.6	101.9	119.0%
⑧The Pachinko and the like	13.4	15.1	17.9	15.3	16.9	19.9	17.2	86.4%
⑨Live Entertainment	3.1	3.9	4.2	1.5	2.9	4.9	5.4	110.2%
⑩Others	14.1	7.5	7.2	6.2	10.1	12.9	49.5	383.7%
Total	245.1	267.0	301.6	274.4	292.7	340.7	427.2	125.4%

Based on questionnaires conducted by the Association of Japanese Animations

### 〈The North American Animation Industry Has Mostly Returned to the Average of Before COVID-19〉

The 2023 North American animation box office reached \$1.7 billion, with North American works accounting for \$1.6 billion of that and foreign movies making up \$93 million (with Japanese movies making up \$81 million of that). These box office numbers are the fourth highest in history, so it can be said that it has returned to the average of the 2010s before the COVID-19 pandemic. However, it has changed greatly since the era before COVID-19 when Pixar and Disney conquered the box office. In 2023, the leading movies were *The Super Mario Bros. Movie*, a joint production by Nintendo and Illumination, and *Spiderman: Across the Spiderverse* from Sony Pictures Animation. The box-office recovery is good news for Hollywood, but there is the problem that original IPs are not being produced. The predictions for current hits are all sequels of previous works. When looking at the current state of Hollywood animation, it is hard to avoid being moved by how strong Japanese animation's effort is in making new works.

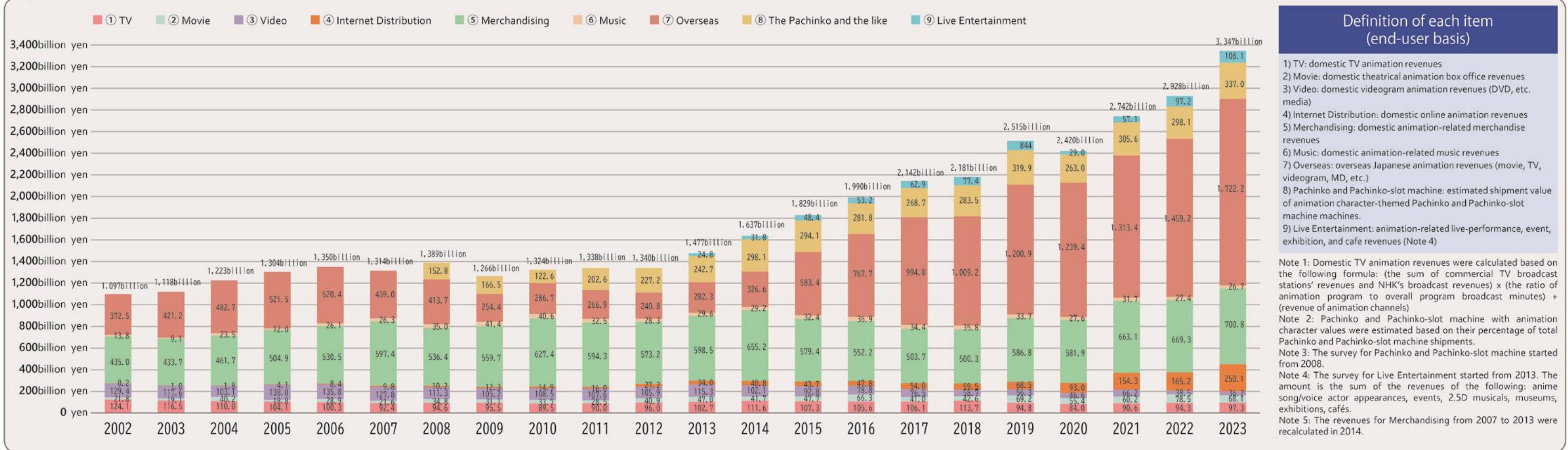
### 〈2023 Became the Chinese Animation Film Industry's Second Highest Year〉

In 2023, the Chinese animation film industry box-office takings grew extensively from the previous year at 226.4%, a 4.5 billion yuan increase to 8 billion yuan (with 1 yuan = 20 yen, it's roughly a 90 billion yen increase to 161 billion yen). This is the second highest revenue in history following 2019, so it can be said that China has also completely escaped the influence of the COVID-19 pandemic. The rapid progress can be attested to Chinese films. The top-grossing movie in the 2023 Chinese animation box office was *Chang'an*, which has also attained the record of second-highest grossing Chinese animated film. 2023's second-highest grossing movie was *Boonie Bears: Guardian Code* and the twelfth was *Deep Sea*, both of which had such incredible driving force that they now rank fifth and twelfth in top-grossing Chinese animated films of all time. However, Japanese films also contributed greatly to the Chinese market in 2023. In 2023, Japanese films set a new record of revenue at 2.1 billion yuan (roughly 42 billion yen). The top-grossing films, which also both took the top two spots in highest-grossing Japanese films in the Chinese animation film box office, were *Suzume* at 808 million yuan (~16 billion yen) and *THE FIRST SLAM DUNK* at 660 million yuan (~13 billion yen). There are thirteen other films in the ranking, including *Castle in the Sky* and *Detective Conan: Black Iron Submarine*.

# Trends in Japanese Animation Market (2024version)

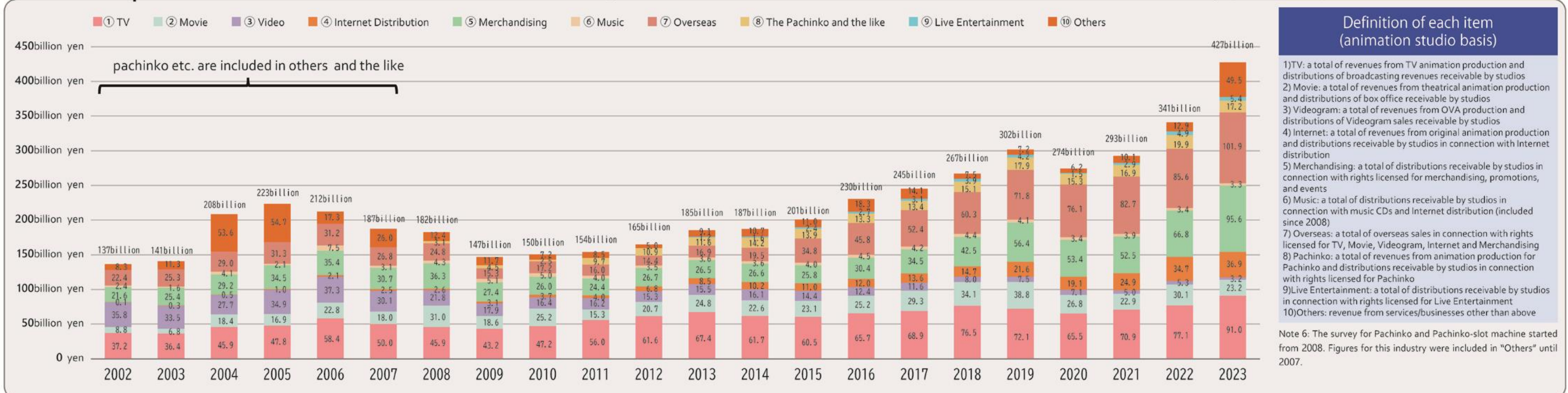
The upper part shows Japanese animation market trends in a broad sense (i.e. market size based on estimated revenues in animation and animation-related product markets). The lower part shows Japanese animation market trends in a more limited sense (i.e. market size based on the estimated revenues of 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 – 2023>



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 – 2023>



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

# Trends in Japanese Animation Market (2024 version)

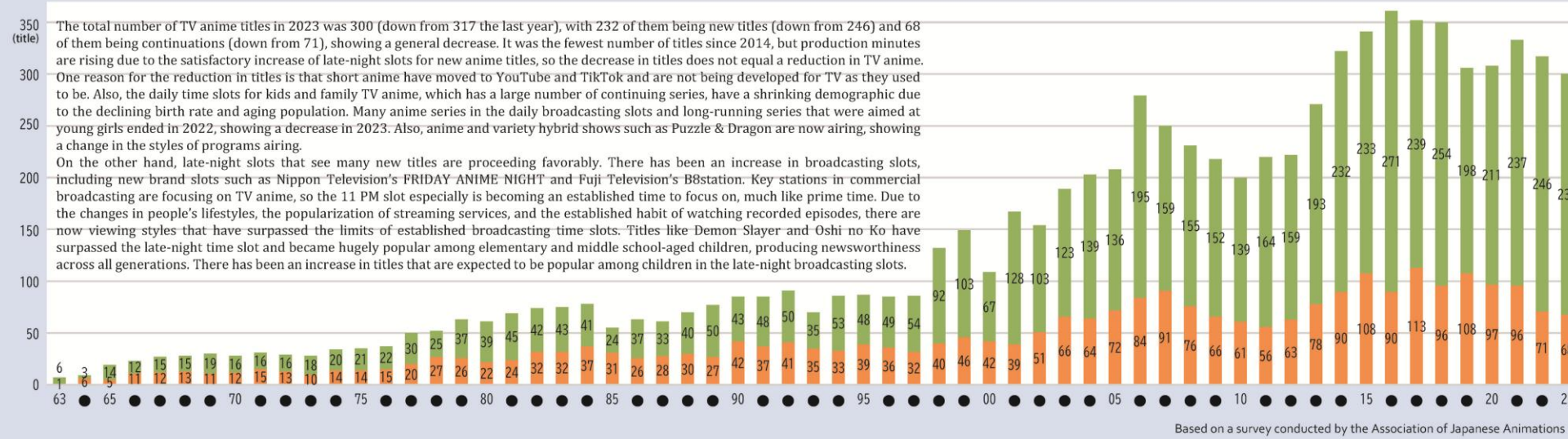
## The Anime Industry Market Finally Broke 3 Trillion Yen, Showing the Highest Ever Growth Rate

### TV Animation programs (1963-2023)

While New and Continuing Titles Decreased Slightly, There Were Changes in Daily and Late-Night Broadcasting Slots

■ 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.

The total number of TV anime titles in 2023 was 300 (down from 317 the last year), with 232 of them being new titles (down from 246) and 68 of them being continuations (down from 71), showing a general decrease. It was the fewest number of titles since 2014, but production minutes are rising due to the satisfactory increase of late-night slots for new anime titles, so the decrease in titles does not equal a reduction in TV anime. One reason for the reduction in titles is that short anime have moved to YouTube and TikTok and are not being developed for TV as they used to be. Also, the daily time slots for kids and family TV anime, which has a large number of continuing series, have a shrinking demographic due to the declining birth rate and aging population. Many anime series in the daily broadcasting slots and long-running series that were aimed at young girls ended in 2022, showing a decrease in 2023. Also, anime and variety hybrid shows such as Puzzle & Dragon are now airing, showing a change in the styles of programs airing. On the other hand, late-night slots that see many new titles are proceeding favorably. There has been an increase in broadcasting slots, including new brand slots such as Nippon Television's FRIDAY ANIME NIGHT and Fuji Television's B8station. Key stations in commercial broadcasting are focusing on TV anime, so the 11 PM slot especially is becoming an established time to focus on, much like prime time. Due to the changes in people's lifestyles, the popularization of streaming services, and the established habit of watching recorded episodes, there are now viewing styles that have surpassed the limits of established broadcasting time slots. Titles like Demon Slayer and Oshi no Ko have surpassed the late-night time slot and became hugely popular among elementary and middle school-aged children, producing newsworthiness across all generations. There has been an increase in titles that are expected to be popular among children in the late-night broadcasting slots.

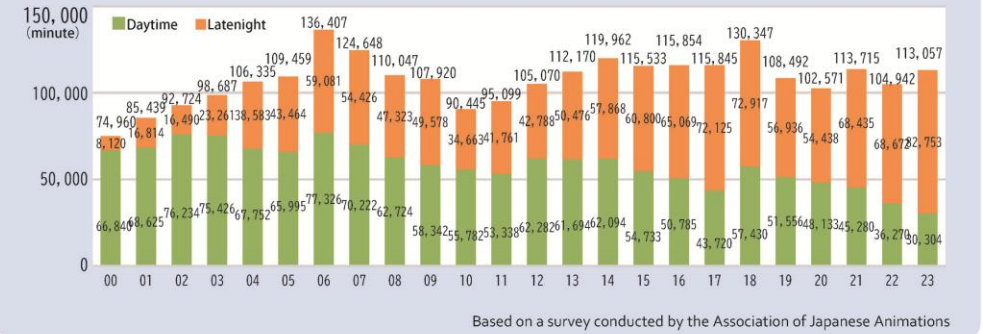


Based on a survey conducted by the Association of Japanese Animations

### Production Minutes of TV Animations (2000-2023)

While New Anime in Late-Night Slots are Performing Well, Continuing Anime in Daily Slots are Decreasing

The 2023 TV anime production minutes reached 113,057 (107.73% of the previous year, which was 100,004.942). The late-night broadcasting slot reached a record of 82,753 minutes (up 120.5% of the previous year), and the daily broadcast showed a continuing decreasing trend for the fifth year in a row, totalling 30,304 minutes (83.55% of the previous year). When the new and continuing anime are divided, there were 84,372 minutes of new anime (up 118.09% of the previous year), reaching the second highest number of minutes ever, while continuing anime decreased for a second year in a row to 28,685 (85.64% of the previous year). While new anime in late-night slots are quite substantial, continuing anime in daily slots are struggling. However, the good conditions of new anime in late-night slots is influenced by the postponement of some series to 2023 due to new regulations in Chinese streaming that were put in place in the second half of 2022. It must be seen whether these increases are temporary or a continuous trend.



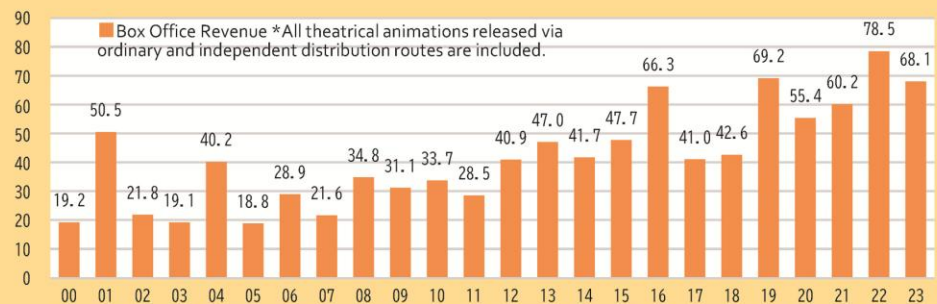
Based on a survey conducted by the Association of Japanese Animations

### Box Office Revenue of Theatrical Animations (2000-2023)

The High Level is Being Maintained and Supported by Big Hits

\*Since 2014, the number of titles has been carefully examined in the "Annual Perfect Data."  
 \*The annual box office revenue is totaled from January 1 to December 31, and for films screened across two years, the revenue is split between the two years.  
 \*This includes not only films released through regular distribution channels but also independently released works.

The box-office revenue for 2023 anime films was 68 billion yen (previously 78 billion yen). That is a 13.2% decrease from the previous year, but it has maintained a high level and is the third highest grossing year in history. The biggest hit of the year was Detective Conan: Black Iron Submarine at 13.8 billion yen. The 2023 box-office revenue of THE FIRST SLAM DUNK, which opened in theaters in December 2022, was 9 billion yen (a total of 15 billion yen), followed by The Boy and the Heron at 8.7 billion yen (8.9 billion yen as of March 2023). Anime films have kept the level around 70 billion yen for the past five years and continue to make up 30-40% of the domestic film industry revenue. Of the 80 anime films released in 2023, there were 14 titles that grossed over 1 billion yen each, showing the presence that anime films have in Japan.



Source: The Association of Japanese Animations, based on the data by Motion Picture Producers Association of Japan/Kinema Junpo/Bukatsushinsha(Data edited by Mindbase Inc. from 2000 to 2008 and by the Association of Japanese Animations from 2009 to 2023)

### The Number of Theatrical Animation Works and the Production Minutes (2000-2023)

Both Production and Revenue are Shifting to a High Level as Attention Rises Both Domestically and Internationally

In 2023, the production minutes of anime films were 6,885 (up from 6,520) and there were 80 titles produced (up from 76). Both production minutes and numbers of titles have continued to increase over the past three years since the COVID-19 pandemic hit in 2020. The number of titles has recovered to its level from before the pandemic and the production minutes has reached the second highest record in history, following 2019. In 2023, long-running series like Detective Conan and Crayon Shin-chan broke records for box-office revenue. Hayao Miyazaki's first long film anime in ten years, The Boy and the Heron, won the American Academy Award for Best Animated Feature in March 2024. The Japanese anime film international industry is on a trend of expansion, and it can be expected to continue developing especially in the North American market.

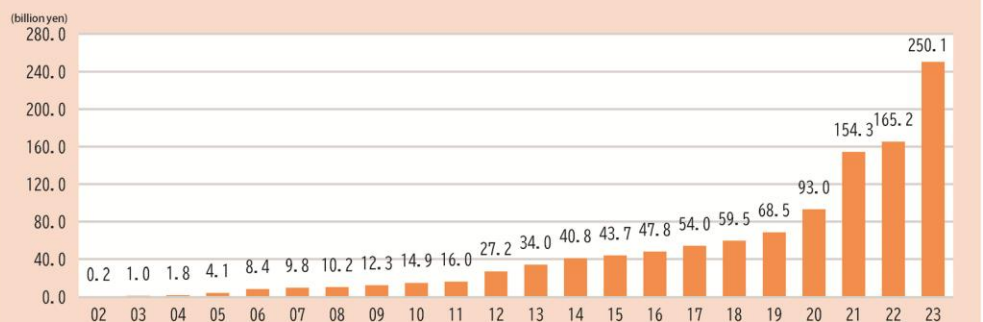


Based on the survey conducted by the Association of Japanese Animations

### Animation Distribution via the Internet (2002-2023)

The Rapid Increase of the End User Market Due to the Increase in Demand and the Competition Between Domestic Streaming Services

The 2023 domestic anime streaming proceeds grew 51.4% from the previous year to 250 billion yen (up from 165 billion yen), showing a rapid growth since 2022, when it was already thought to be high. The rising demand for anime on streaming services and the competition and alliances between domestic streaming services has caused a rapid increase in profits from streaming rights. On the other hand, the demand for original series ordered by foreign streaming businesses remains sluggish and the revenue of production companies is relatively limited compared to the growth of the end user market. As long as there is a limit to the number of viewers in the domestic streaming market and to price elasticity, it is thought that the rapid growth of the end user market is only for a limited time until the competition between domestic streaming services cools down.



Based on a survey conducted by the Association of Japanese Animations

### Animation videograms (2000-2023)

※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.

The Degree of Reduction in the Decreasing Trends Has Stabilized and Movie Packages Ranked High

In 2023, the revenue for the anime video packaging market reached 93.9% of the previous year, 36.2 billion yen. Considering that the average rate of reduction between 2014 and 2020 was 88.0%, this can be taken as proof that the rate has stabilized. The top movie packages were the hits Evangelion: 3.0+1.0 Thrice Upon a Time, ONE PIECE FILM RED, Suzume, and Detective Conan: Black Iron Submarine. Also, packages of full anime concerts such as Uta no☆Prince 2 Maji Love Starish Tours also ranked high. With the increase of experiences such as live anime concert films, it will probably become necessary for packages to also come up with plans to recreate the experience.



Based on a report by Japan Video Software Association

### Merchandising Related to Animation (2000-2023)

※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.

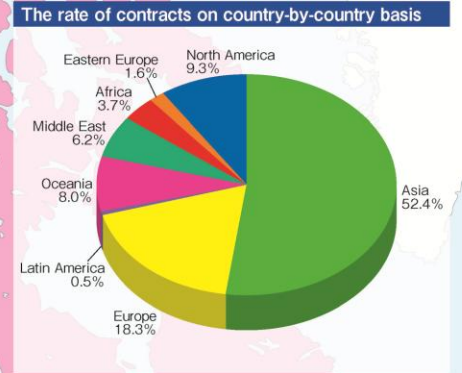
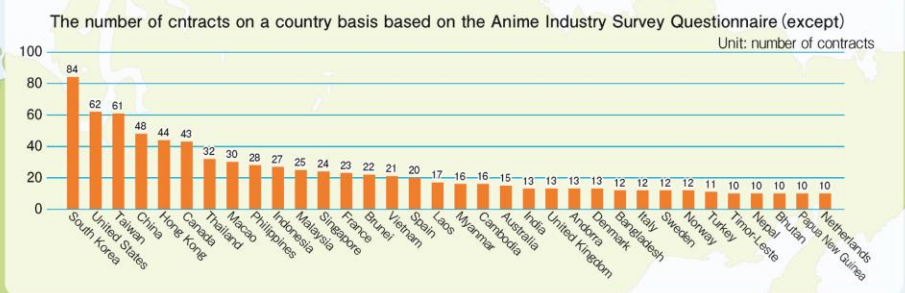
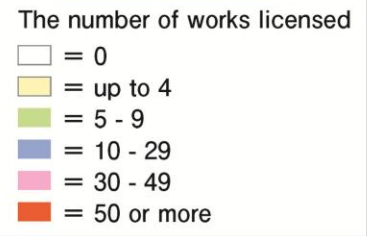
The Standard Character Market Stays Strong as the Family Demographic Enters the Late-Night Anime Broadcasting Slot

The 2023 Japanese anime character merchandising market hit a record high of 700.8 billion yen, 104.7% of the previous year (669.3 billion yen). Some of the series that overtook the market include the new Pocket Monster series; Chiikawa, which grew incredibly popular especially throughout Asia; and standard characters such as those from ONE PIECE and Neon Genesis Evangelion. They exceeded last year's market scale and demonstrated their presence. It is also apparent that as the demand for video streaming services increases, late-night series that were aimed at the traditional core fan market such as Demon Slayer and Oshi no Ko are being enjoyed by families together. When considering the fact that children are more likely to watch YouTube than TV, the demographic reports will continue to be flattened and it will become more difficult to define the core fans vs. the kids/family demographics.



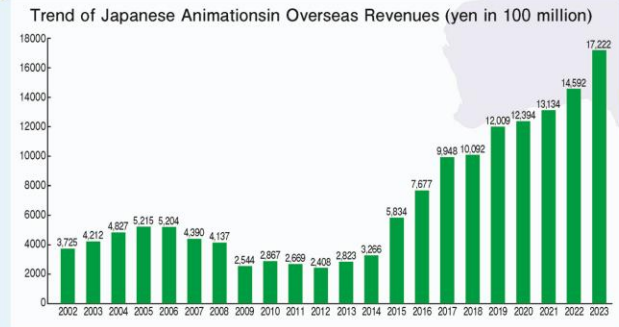
Calculated by the Association of Japanese Animations based on the data from "CharaBiz DATA" (2001-2023)

# Japanese Animation in Overseas Markets (2024 version)



## New Strategies Will Become the Key to Break the Records of the Domestic Market

In 2023, the number of companies that responded to a survey about international contracts rose to 22 from 19 and the number of contracts equaled 1,298 (1,131 separated by country/regions, 167 separated by zones). It's a major drop from last year's 22,862 contracts, but the difference in the numerical answers given in the surveys is greatly influenced by differences in each company's strategies. The number of countries and regions equaled 109 (down from 246), which is a difference of over half, but in terms of the number of contracts by country/region, the order? South Korea, the United States, Taiwan, China, Hong Kong, and Canada? has remained unchanged for many years. There is no mistake that Japanese anime is circulating globally. The 2023 international market is in a favorable situation due to streaming demands and reached 1.7 trillion yen, up 118.0% from last year's 1.5 trillion yen, setting a new record and overtaking the domestic market. Due to the versioning (broadcast, screening, package, streaming) in the international market, it was estimated that it would overtake the domestic market, but it is necessary to establish derivatives (merchandising, music, live entertainment, etc.) like there are in the domestic market to make even more progress.



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

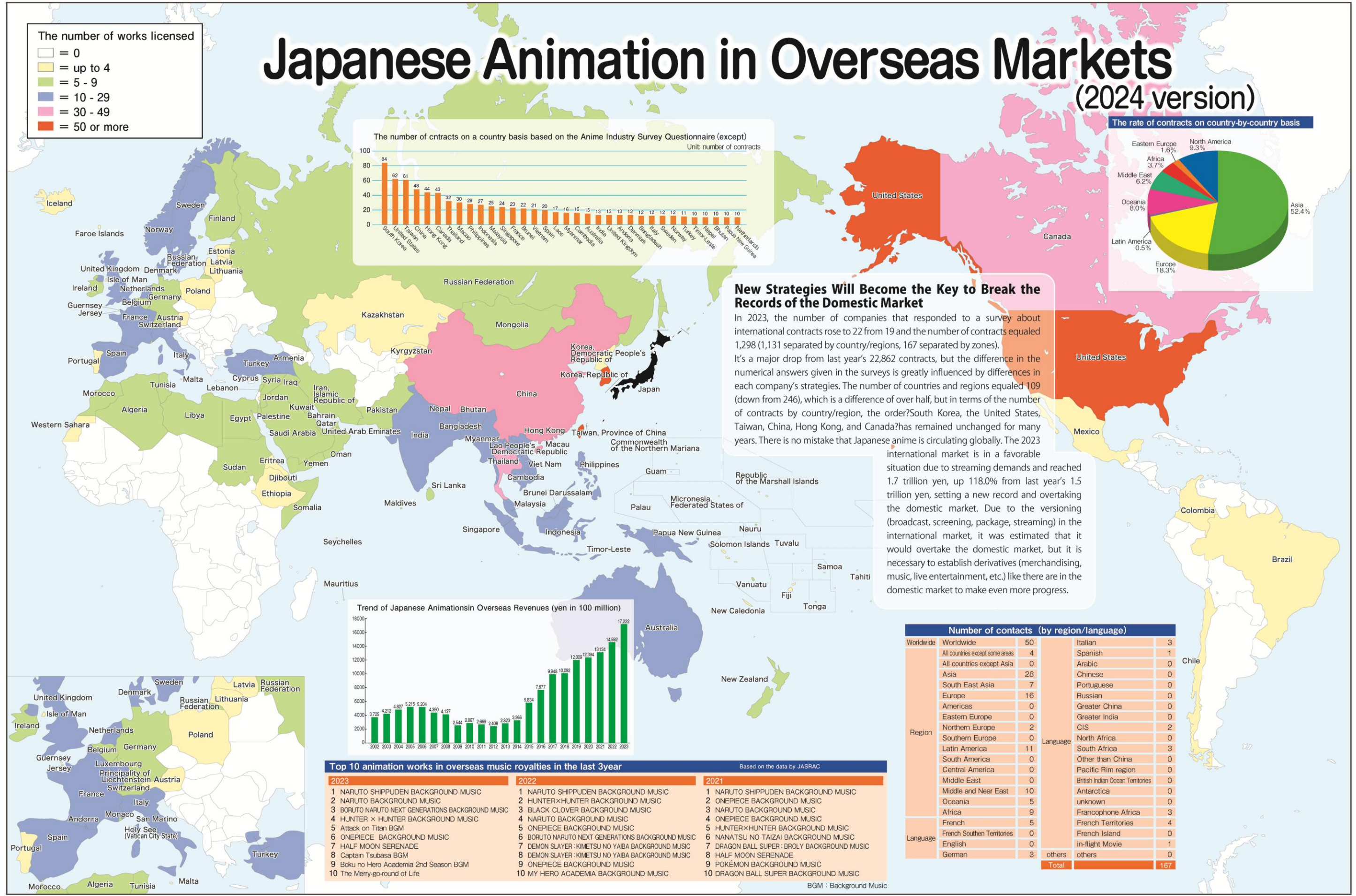
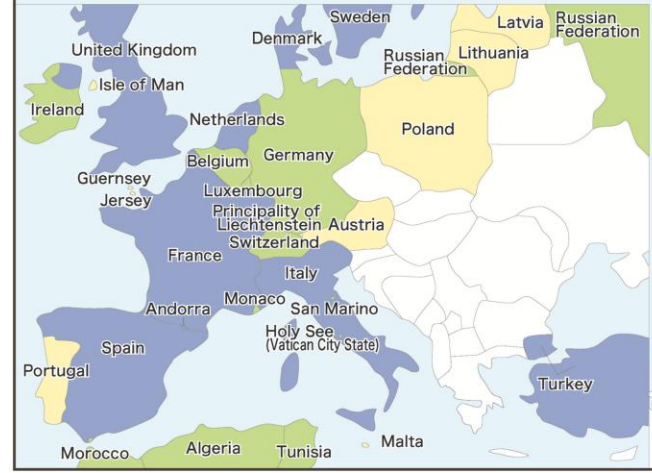
Based on the data by JASRAC

Year	Rank	Work
2023	1	NARUTO SHIPPUDEN BACKGROUND MUSIC
	2	NARUTO BACKGROUND MUSIC
	3	BORUTO NARUTO NEXT GENERATIONS BACKGROUND MUSIC
	4	HUNTER x HUNTER BACKGROUND MUSIC
	5	Attack on Titan BGM
	6	ONEPIECE BACKGROUND MUSIC
	7	HALF MOON SERENADE
	8	Captain Tsubasa BGM
	9	Boku no Hero Academia 2nd Season BGM
	10	The Merry-go-round of Life
2022	1	NARUTO SHIPPUDEN BACKGROUND MUSIC
	2	HUNTERxHUNTER BACKGROUND MUSIC
	3	BLACK CLOVER BACKGROUND MUSIC
	4	NARUTO BACKGROUND MUSIC
	5	ONEPIECE BACKGROUND MUSIC
	6	BORUTO NARUTO NEXT GENERATIONS BACKGROUND MUSIC
	7	DEMON SLAYER: KIMETSU NO YAIBA BACKGROUND MUSIC
	8	DEMON SLAYER: KIMETSU NO YAIBA BACKGROUND MUSIC
	9	ONEPIECE BACKGROUND MUSIC
	10	MY HERO ACADEMIA BACKGROUND MUSIC
2021	1	NARUTO SHIPPUDEN BACKGROUND MUSIC
	2	ONEPIECE BACKGROUND MUSIC
	3	NARUTO BACKGROUND MUSIC
	4	ONEPIECE BACKGROUND MUSIC
	5	HUNTERxHUNTER BACKGROUND MUSIC
	6	NANATSU NO TAIZAI BACKGROUND MUSIC
	7	DRAGON BALL SUPER: BROLY BACKGROUND MUSIC
	8	HALF MOON SERENADE
	9	POKEMON BACKGROUND MUSIC
	10	DRAGON BALL SUPER BACKGROUND MUSIC

BGM : Background Music

Number of contacts (by region/language)

Region	Number of contacts	Language	Number of contacts
Worldwide	50	Italian	3
All countries except some areas	4	Spanish	1
All countries except Asia	0	Arabic	1
Asia	28	Chinese	0
South East Asia	7	Portuguese	0
Europe	16	Russian	0
Americas	0	Greater China	0
Eastern Europe	0	Greater India	0
Northern Europe	2	CIS	2
Southern Europe	0	North Africa	0
Latin America	11	South Africa	3
South America	0	Other than China	0
Central America	0	Pacific Rim region	0
Middle East	0	British Indian Ocean Territories	0
Middle and Near East	10	Antarctica	0
Oceania	5	unknown	0
Africa	9	Francophone Africa	3
French	5	French Territories	4
French Southern Territories	0	French Island	0
English	0	in-flight Movie	1
German	3	others	0
<b>Total</b>	<b>167</b>		

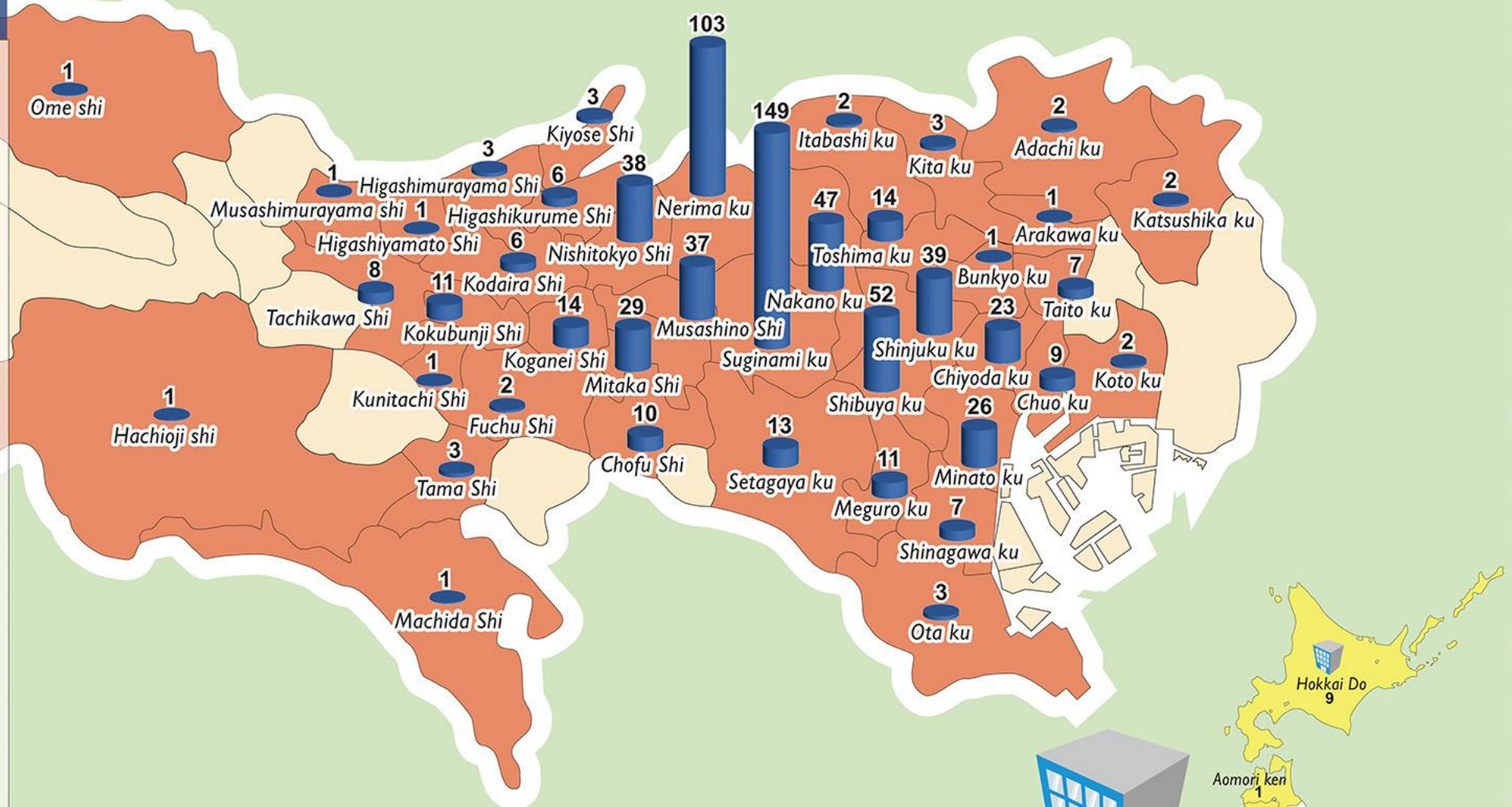


# Distribution of Japanese animation studios (2020 version)

\* 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 2023 anime industry market reached 3.3 trillion yen, up 114.3% from last year.  
The international market continues to expand and once again has overtaken the domestic market.

# Anime Industry Report 2024

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

The 2023 international anime industry market showed excellent growth, reaching a total sum of 3.34 trillion yen, up 114.3% of the previous year. The international market has already accomplished rapid growth, reaching 1.7 trillion yen (up 118.0% from last year) and exceeding the domestic market to take 51.5% of the market share. This is the second time that the international market has exceeded the domestic market since the domestic market fell into a slump due to the COVID-19 pandemic.

Merchandising saw the second highest revenue at 700 billion yen (up 104.7%), taking up 20.9% of the market share.

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

## ■Outline

<b>【Title】</b>	Anime Industry Report 2024
<b>【Publisher】</b>	The Association of Japanese Animations
<b>【Release day】</b>	November 13, 2024
<b>【Size/Pages】</b>	A4 / 120P (Report), + 4 chart sheets inserted
<b>【Price】</b>	22,000 yen (tax excluded)

## 【Publication Summary】

### 1. Overview of the Japanese animation industry in 2024

\*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

\*Anime Settings and Inbound Tourism

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#### **TOKYO ANIME CENTER in DNP PLAZA**

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Back issues (2009-2023) are also available on the site and in the stores above.