

Asia-Pacific Animation & VFX: Strategies, Trends & Opportunities (2022-26) (Includes Covid-19 impact & projections)

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Abstracts

EXECUTIVE SUMMARY

Global consumers are displaying a growing appetite for engaging, high-definition visual experiences. Moviegoers are demanding high quality productions with engaging visual effects and realistic animation and studios are including more animation and VFX shots into films. Consumers are consuming more immersive content across channels such as ultra-high-definition TVs, tablets and smartphones to head mounted devices. Animation, VFX and games content is being consumed not only on Netflix, Amazon, Hulu and Twitch, but also on YouTube, Twitter and Facebook. With the growing internet penetration and access to multimedia devices, customers are spending more time on streaming digital content. Streaming video is the fastest growing distribution channel for animation and is witnessing double digit growth and the same is expected to continue. This growth is attributed to the exponential growth in the number of online video viewers throughout the world.

The demand for animation, VFX and video gaming has expanded with the increase in targeted broadcasting hours by cable and satellite TV, availability of low cost internet access, penetration of mobile devices along with the growing popularity of streaming video. In addition, the demand for Animation and VFX content to power immersive experiences such as Augmented Reality and Virtual Reality is growing exponentially. The rapid advancement of technology has made animation, VFX & games available to the masses, and this industry has become one of the fastest growing segments in the global media and entertainment market. We are increasingly seeing more of animation, VFX and games production taking place in a globally distributed mode. Production work is becoming global with countries as well as regions offering tax incentives, subsidies,

financial support, regional low labor costs etc. and companies are cutting costs by setting up facilities in such regions. Cloud computing is playing a key role in character rendering and modeling processes as cloud based rendering of animation films is more effective and efficient as it reduces the time and cost compared to traditional rendering.

MARKET SIZE

The market size of Asian Animation & VFX US\$ XX billion in 2021

The Asian animation and VFX industry is growing at the rate of XX % YoY

3D animation and VFX are the fastest growing segments

The spend on special effects as a percent of production cost is about XX%

The production cost per animation movie in Asia ranges anywhere between US\$ XX Million to US\$ YY Million

EMERGING TRENDS IN ANIMATION & VFX INDUSTRY

The combination of live action and animation will alter the form, as well as the content, of film animation.

Animation is no longer a profession limited to animators with increasing participation from computer professionals, programmers, technicians etc.

The evolution of visual effects (VFX), augmented reality (AR) and virtual reality (VR) technologies is dramatically changing both the creation and consumption of films, videos, games, and more.

Augmented Reality and Virtual Reality adoption will drive the demand for animation content.

Production work is moving around the world – tax incentives, regional low labor costs and subsidies put pressure on existing companies to reduce costs and set up facilities in tax advantaged or low cost regions.

Media consumption habits are changing rapidly, windows for film releases are narrowing, and follow-on markets are shifting from television, cable, DVD and rentals to streaming and digital downloads.

The international film market in several emerging markets is growing quickly and creating new opportunities. Regulations in several countries limit imported animation content without a certain amount of local participation and studios are collaborating with local partners to produce content.

Although 2D animation will survive, it will be largely in the form of hybrid 2D/3D animation. As well as reducing costs, using CGI for backgrounds allows for a more dynamic camera. The training offered to animators are biased in favor of CGI and so artists with traditional 2D skills are becoming harder to find.

The changing viewing habits favour short productions as a form of entertainment. The viewing habits generally favor short-form content that can be turned out quickly and cheaply.

Merchandise is already a major form of revenue generation for animated films and in future it could form a much larger share of revenues.

The cloud offers an elastic and scalable solution as well as a shift from a traditional capital expenditure model to an operational expense one.

Cloud based rendering of animation films is more effective and efficient as it reduces the time and cost compared to traditional rendering machines. Cloud computing offers a flexible and scaleable to the problem faced by studio infrastructures which do not scale well with new workflows.

ANIMATION, VFX & VIDEO GAMES INDUSTRY RESEARCH

Digital Vector is the world's most authoritative source for Animation, VFX & Video Games Industry research. The industry research, in publication since the year 2003 is the primary source of reference for leading global business executives, government leaders, product managers, researchers, analysts, academia and consultants. The report is the result of hundreds of man years of effort involving leading industry analysts with expertise across various aspects of the Animation, VFX & Games industry value chain. Digital Vector is the source for objective and actionable research to more than

700 plus global Fortune 1000 organizations in more than 40 countries across various value chain and industry functions.

Our research provides insights, information, advice and tools to achieve key priorities and enable the next wave of industry growth by enabling the key decision makers to take the right decisions. The research covers Animation, VFX and Video Games market across 60 plus countries, 6,000 plus Animation, VFX and Games studios and services companies as well as 200 plus animation and games software product companies. It is based on rigorous research methodology, which includes extensive Primary Research supported by in-depth Secondary Research using advanced quantitative and qualitative analysis.

Inputs and insights from our extensive network of Animation, VFX and Video Games industry service provider and consumer stakeholders gives clients a holistic picture of supply and demand they can only get from Digital Vector. Our research offers insights, expert analysis and forecasts about the Animation, VFX & Games industry including value chain analysis, market sizing and forecasting, industry challenges, opportunities, strengths, business models, content demand market size, commercial models, cost structure analysis, talent supply and cost analysis, industry trend, segmentation, government policy analysis, competitive benchmarking, animation software product market analysis, industry eco-system analysis, company profiles, supplier analysis, distributor analysis and product launch strategies.

Clients use Digital Vector's industry research to find answers to questions such as:

What are the emerging market opportunities, market growth factors, annual growth numbers, market size, growth forecasts, content volumes, demand and supply volumes?

Understand the fast-emerging market opportunities and segments and differentiate between them based on size and annual growth.

What are the geography specific industry challenges, characteristics, opportunities and strengths?

What are the risks of entering a new market and how to manage them? How is the market expected to evolve and what could be the future options?

Industry demography of key geographies and their animation landscape

Early identification of changing market conditions and their impact on key industry factors

Benchmark key government policy frameworks across various global markets and make the right partnership choices to make best use of support, subsidies and incentives.

What strategies to adopt for multi-country content collaborations?

Create, formulate and validate business plans towards making a product/service launch or make a buy decision?

What are the key attributes of specific geographical markets and how are they expected to evolve?

Key metrics to measure the differentiators of the industry to succeed at local, regional and global scale

What technology and business model disruptions will impact the Animation, VFX and video games industry in the next 2-5 years? What kind of impact will they have?

METHODOLOGY

Our methodologies and analysis techniques process large volumes of structured and unstructured data into actionable insights and recommendations which empower our clients to take effective business decisions. Our global network of industry experts have deep expertise across various aspects of the Animation, VFX and Video Games industry value chain such as production, pre and post production, technology, machine learning, outsourcing, software products, financial modelling, content marketing, sales, merchandising, content supply chain, distribution channels, risk analysis, studio management, human resource, finance, legal and policy.

PRIMARY AND SECONDARY DATA

Primary data about the animation, VFX and video games industry are collected from animation and game studio managers, software product managers, directors,

technology vendors, animators, game designers and developers, end users, academics, government officials, festival organisers, eSports organisers etc. Data is collected through periodic surveys and in-depth interviews (in-person, telephonic, email, video as well as chat based), with government officials, academics, and animation companies' managers. These are structured, unstructured and focused interviews conducted in formal, informal as well as open ended settings. Other sources of data and information include focus group discussions, trade visits, webinars, product demonstrations, as well as direct observation.

Secondary market research data sources include books and journals, annual reports, investment analyst reports, government policy notes, labour statistics, newspaper articles, census and statistical data, databases, trade, marketing and promotional literature, articles, surveys and other publications. The secondary market data is aided by Digital Vector's sophisticated market analysis tools, real-time data collection and aggregation software, proprietary databases and framework.

MACHINE LEARNING BASED ANALYSIS

Digital Vector employs a wide range of research methods and employs multi-method analysis including quantitative, qualitative as well as network analysis. Our proprietary methodologies and analysis frameworks are powered by machine learning, natural language processing, quantitative modelling, trend analysis etc. Pattern recognition is adopted to analyse data from multiple sources to identify emerging patterns within markets, change parameters and simulate scenarios.

Our five-year market forecasts are aimed to provide decision makers with a detailed understanding of the Animation, VFX and Video Games industry. The forecasts are based on machine learning models built on input parameters specific to the characteristics of a particular market or a segment. The industry model parameters and assumptions are powered by several data sources from primary and secondary research, our proprietary databases as well as real-time data from several industry and government sources.

Contents

EXECUTIVE SUMMARY

Impact of Covid-19 on Global Animation & VFX
Impact of Covid-19 on Industry Value Chain

ASIAN ANIMATION & VFX

Animation in Asian Societies

Establishment of Local Animation Industry

LOCAL CONTENT PRODUCTIONS

SUCCESSFUL BUSINESS MODELS

DRIVERS FOR SUCCESS

MODELS FOR ANIMATION FINANCING IN ASIA

COPYRIGHT CHAIN IN ASIA

Influence of Foreign Animation Styles

POPULARITY OF FOREIGN ANIMATION

Trends in Animation Production in Asia

ANIMATION CO-PRODUCTIONS IN ASIA

COLLABORATION AMONG ASIAN AND FOREIGN ANIMATION STUDIOS

Animation Studios in Asia

Asian Animation and VFX Market Size & Opportunity

Asian Animation & VFX market segmentation by Industry applications

ASIAN TELEVISION ANIMATION CONTENT DEMAND FORECAST

JAPAN ANIMATION & VFX

Industry Overview

Impact of Covid-19 on Japanese Animation & VFX

History of Japanese animation

Key Trends

MARKET OVERVIEW

COLLABORATION BETWEEN JAPANESE AND OVERSEAS STUDIOS

OUTSOURCING TO OTHER COUNTRIES

SUCCESSFUL BUSINESS MODELS

Anime Exports

OVERSEAS INFLUENCE OF ANIME

GLOBALLY SUCCESSFUL JAPANESE ANIMES**THE POKEMON PHENOMENON**

Japanese Anime Production Models

PROMINENCE OF 2D**RETAS - SOFTWARE FOR ANIME PRODUCTION****MANGA STUDIO - SOFTWARE FOR MANGA PRODUCTION**

Statistics on Animation Studios in Japan

Strategies for Japanese Animation Studios

CHALLENGES**FUTURE TRENDS**

Animation Studios in Japan

INDIA ANIMATION & VFX

Industry Overview

Impact of Covid-19 on Indian Animation & VFX

Current State of the Industry

KEY TRENDS**CHALLENGES**

Business Models of Animation Studios in India

REVENUE MODELS**COST STRUCTURE****TOONZANIMATION INDIA'S IN-HOUSE ANIMATION PROJECT****INDIA'S FIRST FULLY INDIGENEOUS FEATURE FILM**

State of Television Animation in India

VIEWERSHIP PATTERNS OF ANIMATION CHANNELS IN INDIA**ADVERTISING TRENDS IN KIDS CHANNELS****GROWTH IN KIDS ANIMATION CONTENT****MERCHANDISING****EMERGING TRENDS****KEY CHALLENGES**

Size of the Indian Animation Industry

RISING DOMESTIC DEMAND**CHHOTA BHEEM: INDIA'S SUCCESSFUL ANIMATION PRODUCTION****MIGHTY LITTLE BHEEM: NETFLIX'S GLOBALLY SUCCESSFUL INDIAN****ANIMATION SHOW**

Statistics on Animation Studios in India

Strategies for Animation Studios in India

THE RISKS

FUTURE OUTLOOK

Animation Schools in India

LEADING ANIMATION STUDIOS IN INDIA

CHINA ANIMATION & VFX

Industry Overview

IMPACT OF COVID-19 ON CHINESE ANIMATION & VFX

CURRENT STATE OF THE CHINESE ANIMATION INDUSTRY

KEY TRENDS

CHALLENGES

DEMAND FOR LOCAL CONTENT

GOVERNMENT SUPPORT

MARKET OPPORTUNITY

CHINESE MARKET FOR TV ANIMATION

CHINESE TV ANIMATION VALUE CHAIN

KEY CHALLENGES IN THE CHINESE MARKET FOR TV ANIMATION

BUSINESS MODELS OF ANIMATION STUDIOS IN CHINA

REVENUE MODELS

LICENSING

COST STRUCTURE

SIZE OF THE CHINESE ANIMATION INDUSTRY

Statistics on Animation Studios in China

STRATEGIES FOR ANIMATION STUDIOS IN CHINA

THE RISKS

OVERSEAS EXPANSION

FUTURE OUTLOOK

ANIMATION STUDIOS IN CHINA

SOUTH KOREA ANIMATION & VFX

Industry Overview

IMPACT OF COVID-19 ON KOREAN ANIMATION & VFX

Emergence of the Industry

Functioning of Korean Animation Studios

Changing Business Models

GOING BEYOND SUBCONTRACTING

INVESTMENTS BY INDUSTRIAL GROUPS

CHANGES IN INDUSTRY STRUCTURE

SUCCESS IN OTHER COUNTRIES

Current State of the Industry

GOVERNMENT SUPPORT**COLLABORATION WITH OVERSEAS PARTNERS****KEY TRENDS****LOCAL CONTENT****CHALLENGES****ANIMATION SCHOOLS IN KOREA****ANIMATION STUDIOS IN KOREA**

Market Opportunity

MARKET SIZE OF THE KOREAN ANIMATION INDUSTRY

Statistics on Animation Studios in Korea

Future Outlook

PHILIPPINES ANIMATION & VFX

Industry Overview

IMPACT OF COVID-19 ON PHILIPPINES ANIMATION & VFX

Current State of the Industry

KEY TRENDS**COMPETITION****INDUSTRY CAPACITY****BRAND BUILDING****GOVERNMENT SUPPORT****DEMAND FOR LOCAL CONTENT****FUNDING****ANIMATION OUTSOURCING IN PHILIPPINES****ANIMATED FEATURE FILMS IN PHILIPPINES****INDUSTRY RECOVERY****INDUSTRY ADVANTAGES****CHALLENGES**

Animation Education and Training in Philippines

Size of Animation Industry in Philippines

Statistics on Animation Studios in Philippines

Strategies for Philippine Animation Studios

FUTURE OUTLOOK

Animation Studios in Philippines

TAIWAN ANIMATION & VFX

Impact of Covid-19 on Taiwan's Animation & VFX

Current State of the Industry

KEY TRENDS

LOCAL CONTENT

COMPETITION

GOVERNMENT SUPPORT

COMPETITIVE ADVANTAGES

CHALLENGES

TAIWAN'S FIRST 3D ANIMATED FEATURE FILM

Threats to Taiwan's Animation Studios

Animation Schools in Taiwan

Statistics on Animation Studios in Taiwan

Strategies for Animation Studios in Taiwan

FUTURE OUTLOOK

Animation Studios in Taiwan

VIETNAM ANIMATION & VFX

Industry Overview

Impact of Covid-19 on Vietnam's Animation & VFX

Key Trends

CAPABILITIES OF VIETNAMESE ANIMATORS

VIETNAM'S 3D ANIMATED FEATURE FILM

LOCAL ANIMATION PRODUCTIONS IN VIETNAM

OPPORTUNITIES

CHALLENGES

FUTURE TRENDS

Animation Studios in Vietnam

Statistics on Animation Studios in Vietnam

Strategies for Animation Studios in Vietnam

FUTURE OUTLOOK

THAILAND ANIMATION & VFX

Industry Overview

Impact of Covid-19 on Thailand's Animation & VFX

Key Trends

EARLY PRODUCTIONS

LOCAL CONTENT

THAILAND'S FIRST 3D ANIMATED FEATURE FILM

LOCAL ANIMATION PRODUCTIONS IN THAILAND

GOVERNMENT SUPPORT

INDUSTRY DRIVERS

CHALLENGES

INDUSTRY OPPORTUNITIES

Strategies for Animation Studios in Thailand

Animation Studios in Thailand

Statistics on Animation Studios in Thailand

SINGAPORE ANIMATION & VFX

Industry Overview

Impact of Covid-19 on Singapore Animation & VFX

Industry Industry Trends

LOCAL ANIMATION PRODUCTIONS IN SINGAPORE

SINGAPORE GOVERNMENT INITIATIVES

INDUSTRY DRIVERS

CHALLENGES

Statistics on Animation Studios in Singapore

Animation Studios in Singapore

Animation Schools in Singapore

AUSTRALIA ANIMATION & VFX

Industry Overview

Impact of Covid-19 on Australian Animation & VFX

Recent Movie Trends in Australia

Industry evolution and key Animation productions

Strategies for Animation Studios in Australia

CHALLENGES

GOVERNMENT SUPPORT

Animation Studios in Australia

Animation Movies in Australia

Animation Schools in Australia

Profile of Animation Studios in Australia

MALAYSIA ANIMATION & VFX

Industry Overview

Impact of Covid-19 on Malaysian Animation & VFX

History of Malaysian Animation

Strategies for Malaysian Animation Industry

GOVERNMENT SUPPORT

INDUSTRY DRIVERS

CHALLENGES FOR MALAYSIAN ANIMATION INDUSTRY

INDUSTRY OPPORTUNITIES

Strategies for Animation Studios in Malaysia

MALAYSIA'S FIRST 3D ANIMATED FEATURE FILM

Statistics for Animation Studios in Malaysia

Animation Studios in Malaysia

Animation Schools in Malaysia

INDONESIA ANIMATION & VFX

Industry Overview

Impact of Covid-19 on Indonesian Animation & VFX

Strategies for Indonesian Animation Industry

GOVERNMENT SUPPORT

INDUSTRY DRIVERS

CHALLENGES FOR INDONESIAN ANIMATION INDUSTRY

INDUSTRY OPPORTUNITIES

Recommendations for the Industry

INDONESIA'S FIRST 3D ANIMATED FEATURE FILM

Statistics on Animation Studios in Indonesia

Animation Studios in Indonesia

ISRAEL ANIMATION & VFX

Industry Overview

Impact of Covid-19 on Israel's Animation & VFX

Current State of the Industry

INDUSTRY TRENDS & DRIVERS

INDUSTRY CHALLENGES

Israel's first animated feature film

Statistics on Animation Studios in Israel

Animation Studios in Israel

PAKISTAN ANIMATION & VFX

Industry Overview

Impact of Covid-19 on Pakistan's Animation & VFX

History of Pakistan Animation Industry

Current State of the Industry

KEY TRENDS

PAKISTAN'S FIRST 3D ANIMATED FEATURE FILM

INDUSTRY DRIVERS

CHALLENGES

INDUSTRY RISKS

Strategies for Animation Industry in Pakistan

INDUSTRY OPPORTUNITIES

FUTURE TRENDS

Animation Studios in Pakistan

Statistics for Animation Studios in Pakistan

BANGLADESH ANIMATION & VFX

Industry Overview

Impact of Covid-19 on Bangladesh's Animation & VFX

Current State of the Industry

KEY TRENDS

INDUSTRY DRIVERS

CHALLENGES

THE RISKS

BANGLADESH'S GLOBALLY SUCCESSFUL ANIMATED SHORT FILM

Strategies for Animation Industry in Bangladesh

INDUSTRY OPPORTUNITIES

FUTURE TRENDS

Animation Studios in Bangladesh

UNITED ARAB EMIRATES ANIMATION & VFX

Industry Overview

Impact of Covid-19 on UAE's Animation & VFX

Emergence of the Middle Eastern Animation

Key Industry Trends

LOCAL CONTENT CREATION
United Arab Emirates Animation & VFX
GOVERNMENT SUPPORT
INTERNATIONAL COLLABORATION
DUBAI'S FIRST 3D ANIMATED FEATURE FILM

SAUDI ARABIA ANIMATION & VFX

Industry Overview
IMPACT OF COVID-19 ON SAUDI ARABIA'S ANIMATION & VFX
GOVERNMENT SUPPORT
STRATEGIES FOR INDUSTRY GROWTH

Figures & Tables

FIGURES AND TABLES

TABLE: IMPACT OF COVID-19 ON GLOBAL ANIMATION & VFX

TABLE: ANIMATION MOVIE CO-PRODUCTIONS IN ASIA

TABLE: KEY ANIMATION STUDIOS IN ASIA

FIGURE: COUNTRY-WISE COST-QUALITY MATRIX OF ANIMATION IN ASIA

FIGURE: COUNTRY-WISE COST OF PRODUCING ONE EPISODE OF ANIMATION IN ASIA

FIGURE: ANNUAL ANIMATION OUTPUT IN ASIA

TABLE: ANIMATION MOVIES PRODUCED IN ASIA

FIGURE: MARKET SIZE OF ASIAN ANIMATION & VFX INDUSTRY

FIGURE: MARKET SIZE OF ASIAN ANIMATION, VFX & GAMING INDUSTRY SEGMENTS

FIGURE: ASIAN ANIMATION, VFX & GAMING INDUSTRY SEGMENTS BASED ON APPLICATIONS

FIGURE: MARKET SIZE OF MOVIES & TELEVISION SEGMENT OF ASIAN ANIMATION & VFX INDUSTRY

FIGURE: MARKET SIZE OF MANUFACTURING SEGMENT OF ASIAN ANIMATION & VFX INDUSTRY

FIGURE: MARKET SIZE OF ARCHITECTURE & ENGINEERING SEGMENT OF ASIAN ANIMATION & VFX INDUSTRY

FIGURE: MARKET SIZE OF EDUCATION SEGMENT OF ASIAN ANIMATION & VFX INDUSTRY

FIGURE: MARKET SIZE OF MEDICAL, HEALTHCARE & SCIENTIFIC SEGMENT OF ASIAN ANIMATION & VFX INDUSTRY

FIGURE: MARKET SIZE OF GOVERNMENT & DEFENCE SEGMENT OF ASIAN ANIMATION & VFX INDUSTRY

FIGURE: MARKET SIZE OF MARKETING & ADVERTISING SEGMENT OF ASIAN ANIMATION & VFX INDUSTRY

TABLE: MINUTES OF TELEVISION ANIMATION CONTENT DEMAND IN ASIA

FIGURE: MINUTES OF 2D/3D TELEVISION ANIMATION CONTENT DEMAND BY IN ASIA

TABLE: IMPACT OF COVID-19 ON JAPANESE ANIMATION & VFX

TABLE: MOST POPULAR JAPANESE ANIMATION MOVIES

FIGURE: SIZE OF ANIMATION & VFX INDUSTRY IN JAPAN

FIGURE: SIZE OF ANIMATION & VFX INDUSTRY IN JAPAN

FIGURE: MINUTES OF TV ANIMATION PRODUCTION IN JAPAN

FIGURE: NUMBER OF ANIMATION STUDIOS IN JAPAN

FIGURE: ANIMATION STUDIOS IN JAPAN BASED ON SIZE

FIGURE: ANIMATION STUDIOS IN JAPAN BASED ON CAPABILITIES

FIGURE: ANIMATION STUDIOS IN JAPAN BASED ON APPLICATIONS

FIGURE: PEOPLE EMPLOYED IN THE JAPANESE ANIMATION INDUSTRY

FIGURE: COST OF PRODUCING ONE EPISODE OF ANIMATION IN JAPAN

FIGURE: ANIMATION OUTPUT OF JAPANESE ANIMATION INDUSTRY

FIGURE: BREAK-UP OF ANIMATION OUTPUT OF JAPANESE ANIMATION INDUSTRY

FIGURE: 3D ANIMATION SALARIES IN JAPAN

FIGURE: 2D ANIMATION SALARIES IN JAPAN

FIGURE: WEB & MOBILE ANIMATION SALARIES IN JAPAN

FIGURE: GAMING SALARIES IN JAPAN

TABLE: LEADING ANIMATION STUDIOS IN JAPAN

TABLE: IMPACT OF COVID-19 ON INDIAN ANIMATION & VFX

FIGURE: MARKET SIZE OF INDIAN ANIMATION INDUSTRY

FIGURE: MARKET SIZE OF INDIA'S ANIMATION, VFX & VIDEO GAMING SEGMENTS

FIGURE: INDIAN ANIMATION, VFX & GAMING INDUSTRY SEGMENTS BASED ON APPLICATIONS

FIGURE: MARKET SIZE OF MOVIES & TELEVISION SEGMENT OF INDIAN ANIMATION & VFX INDUSTRY

FIGURE: MARKET SIZE OF MANUFACTURING SEGMENT OF INDIAN ANIMATION & VFX INDUSTRY

FIGURE: MARKET SIZE OF ARCHITECTURE & ENGINEERING SEGMENT OF INDIAN ANIMATION & VFX INDUSTRY

FIGURE: MARKET SIZE OF EDUCATION SEGMENT OF INDIAN ANIMATION & VFX INDUSTRY

FIGURE: MARKET SIZE OF MEDICAL, HEALTHCARE & SCIENTIFIC SEGMENT OF INDIAN ANIMATION & VFX INDUSTRY

FIGURE: MARKET SIZE OF GOVERNMENT & DEFENCE SEGMENT OF INDIAN ANIMATION & VFX INDUSTRY

FIGURE: MARKET SIZE OF MARKETING & ADVERTISING SEGMENT OF INDIAN ANIMATION & VFX INDUSTRY

FIGURE: INDIA'S FIRST FULLY CEL-ANIMATED MUSIC VIDEO

FIGURE: TOONZ ANIMATION'S IN-HOUSE PRODUCTIONS

FIGURE: HANUMAN THE MOVIE

TABLE ; TELEVISION ANIMATION CONTENT DEMAND FORECAST IN INDIA

TABLE: VALUE AND VOLUME OF TELEVISION ANIMATION CONTENT DEMAND IN

INDIA**FIGURE: INDIAN ANIMATION INDUSTRY BASED ON OUTPUT****FIGURE: COST OF PRODUCING ONE EPISODE OF ANIMATION IN INDIA****TABLE: ANIMATED FEATURE FILMS PRODUCED IN INDIA****TABLE: ANIMATED TELEVISION SERIES PRODUCED IN INDIA****FIGURE: CHHOTA BHEEM****FIGURE: MIGHTY LITTLE BHEEM****FIGURE: NUMBER OF ANIMATION STUDIOS IN INDIA****FIGURE: ANIMATION STUDIOS IN INDIA BASED ON SIZE****FIGURE: ANIMATION STUDIOS IN INDIA BASED ON CAPABILITIES****FIGURE: ANIMATION STUDIOS IN INDIA BASED ON APPLICATIONS****FIGURE: PEOPLE EMPLOYED IN THE INDIAN ANIMATION INDUSTRY****FIGURE: MINUTES OF ANIMATION CONTENT PRODUCED IN INDIA****FIGURE: BREAK-UP OF MINUTES OF ANIMATION CONTENT PRODUCED IN INDIA****FIGURE: 3D ANIMATION SALARIES IN INDIA****FIGURE: 2D ANIMATION SALARIES IN INDIA****FIGURE: WEB & MOBILE ANIMATION SALARIES IN INDIA****FIGURE: GAMING SALARIES IN INDIA****TABLE: ANIMATION SCHOOLS IN INDIA****TABLE: INDIA'S LEADING ANIMATION STUDIOS****TABLE: IMPACT OF COVID-19 ON CHINESE ANIMATION & VFX****TABLE: ANIMATION CONTENT DEVELOPED BY CHINESE STUDIOS****TABLE: TOP GROSSING ANIMATION MOVIES IN CHINA****FIGURE: THRU THE MOEBIUS STRIP****FIGURE: MARKET SIZE OF CHINESE ANIMATION INDUSTRY****FIGURE: MARKET SIZE OF CHINA'S ANIMATION, VFX & GAMING INDUSTRY SEGMENTS****FIGURE: CHINA'S ANIMATION, VFX & GAMING INDUSTRY SEGMENTS BASED ON APPLICATIONS****FIGURE: MINUTES OF ANIMATION CONTENT DEMAND VS. SUPPLY IN CHINA****FIGURE: VALUE OF CHINESE ANIMATION CONTENT DEMAND VS. SUPPLY****FIGURE: MARKET SIZE OF MOVIES & TELEVISION SEGMENT OF CHINA'S ANIMATION & VFX INDUSTRY****FIGURE: MARKET SIZE OF MANUFACTURING SEGMENT OF CHINA'S ANIMATION & VFX INDUSTRY****FIGURE: MARKET SIZE OF ARCHITECTURE & ENGINEERING SEGMENT OF CHINA'S ANIMATION & VFX INDUSTRY****FIGURE: MARKET SIZE OF EDUCATION SEGMENT OF CHINA'S ANIMATION & VFX INDUSTRY**

FIGURE: MARKET SIZE OF MEDICAL, HEALTHCARE & SCIENTIFIC SEGMENT OF CHINA'S ANIMATION & VFX INDUSTRY

FIGURE: MARKET SIZE OF GOVERNMENT & DEFENCE SEGMENT OF CHINA'S ANIMATION & VFX INDUSTRY

FIGURE: MARKET SIZE OF MARKETING & ADVERTISING SEGMENT OF CHINA'S ANIMATION & VFX INDUSTRY

FIGURE: COST OF PRODUCING ONE EPISODE OF ANIMATION IN CHINA

FIGURE: NUMBER OF ANIMATION STUDIOS IN CHINA

FIGURE: ANIMATION STUDIOS IN CHINA BASED ON SIZE

FIGURE: ANIMATION STUDIOS IN CHINA BASED ON CAPABILITIES

FIGURE: ANIMATION STUDIOS IN CHINA BASED ON APPLICATIONS

FIGURE: PEOPLE EMPLOYED IN THE CHINESE ANIMATION INDUSTRY

FIGURE: MINUTES OF ANIMATION CONTENT PRODUCED IN CHINA

FIGURE: BREAK-UP OF ANIMATION CONTENT PRODUCED IN CHINA

FIGURE: 3D ANIMATION SALARIES IN CHINA

FIGURE: 2D ANIMATION SALARIES IN CHINA

FIGURE: WEB & MOBILE ANIMATION SALARIES IN CHINA

FIGURE: GAMING SALARIES IN CHINA

TABLE: LIST OF ANIMATION SCHOOLS IN CHINA

TABLE: CHINA'S LEADING ANIMATION STUDIOS

TABLE: TOP TEN ANIMATION STUDIOS IN CHINA

TABLE: IMPACT OF COVID-19 ON KOREAN ANIMATION & VFX

TABLE: IN-HOUSE CONTENT DEVELOPED BY KOREAN ANIMATION STUDIOS

TABLE: ANIMATION SCHOOLS IN KOREA

TABLE: KOREA'S LEADING ANIMATION & VFX STUDIOS

FIGURE: MARKET SIZE OF KOREAN ANIMATION & VFX INDUSTRY

FIGURE: KOREA ANIMATION DOMESTIC BOX OFFICE

FIGURE: KOREAN MARKET FOR ANIMATION-RELATED MERCHANDISE

FIGURE: NUMBER OF ANIMATION STUDIOS IN KOREA

FIGURE: ANIMATION STUDIOS IN KOREA BASED ON SIZE

FIGURE: ANIMATION STUDIOS IN KOREA BASED ON CAPABILITIES

FIGURE: ANIMATION STUDIOS IN KOREA BASED ON APPLICATIONS

FIGURE: COST OF PRODUCING ONE EPISODE OF ANIMATION IN KOREA

FIGURE: MINUTES OF ANIMATION CONTENT PRODUCED IN KOREA

FIGURE: BREAK-UP OF ANIMATION CONTENT PRODUCED IN KOREA

FIGURE: 3D ANIMATION SALARIES IN KOREA

FIGURE: 2D ANIMATION SALARIES IN KOREA

FIGURE: WEB & MOBILE ANIMATION SALARIES IN KOREA

FIGURE: GAMING SALARIES IN KOREA

TABLE: IMPACT OF COVID-19 ON PHILIPPINES ANIMATION & VFX
FIGURE: URDUJA, ANIMATED FEATURE FILM FROM PHILIPPINES
FIGURE: DAYO, ANIMATED FEATURE FILM FROM PHILIPPINES
TABLE: LEADING ANIMATION TRAINING SCHOOLS IN PHILIPPINES
FIGURE: SIZE OF PHILIPPINE ANIMATION INDUSTRY
FIGURE: NUMBER OF ANIMATION STUDIOS IN PHILIPPINES
FIGURE: ANIMATION STUDIOS IN PHILIPPINES BASED ON SIZE
FIGURE: ANIMATION STUDIOS IN PHILIPPINES BASED ON CAPABILITIES
FIGURE: ANIMATION STUDIOS IN PHILIPPINES BASED ON APPLICATIONS
FIGURE: PEOPLE EMPLOYED IN THE PHILIPPINE ANIMATION INDUSTRY
FIGURE: COST OF PRODUCING ONE EPISODE OF ANIMATION IN PHILIPPINES
FIGURE: MINUTES OF ANIMATION CONTENT PRODUCED IN PHILIPPINES
FIGURE: BREAK-UP OF ANIMATION CONTENT PRODUCED IN PHILIPPINES
FIGURE: 3D ANIMATION SALARIES IN PHILIPPINES
FIGURE :2D ANIMATION SALARIES IN PHILIPPINES
FIGURE: WEB & MOBILE ANIMATION SALARIES IN PHILIPPINES
FIGURE: GAMING SALARIES IN PHILIPPINES
TABLE: LEADING ANIMATION STUDIOS IN PHILIPPINES
TABLE: IMPACT OF COVID-19 ON TAIWAN'S ANIMATION & VFX
FIGURE: TAIWAN'S FIRST 3D ANIMATED FEATURE FILM
TABLE: ANIMATION SCHOOLS IN TAIWAN
FIGURE: NUMBER OF ANIMATION STUDIOS IN TAIWAN
FIGURE: ANIMATION STUDIOS IN TAIWAN BASED ON SIZE
FIGURE: ANIMATION STUDIOS IN TAIWAN BASED ON CAPABILITIES
FIGURE: ANIMATION STUDIOS IN TAIWAN BASED ON APPLICATIONS
FIGURE: PEOPLE EMPLOYED IN THE TAIWANESE ANIMATION INDUSTRY
FIGURE: COST OF PRODUCING ONE EPISODE OF ANIMATION IN TAIWAN
FIGURE: MINUTES OF ANIMATION CONTENT PRODUCED IN TAIWAN
FIGURE: BREAK-UP OF ANIMATION CONTENT PRODUCED IN TAIWAN
FIGURE: 3D ANIMATION SALARIES IN TAIWAN
FIGURE :2D ANIMATION SALARIES IN TAIWAN
FIGURE: WEB & MOBILE ANIMATION SALARIES IN TAIWAN
FIGURE: GAMING SALARIES IN TAIWAN
TABLE: LEADING ANIMATION STUDIOS IN TAIWAN
TABLE: IMPACT OF COVID-19 ON VIETNAM'S ANIMATION & VFX
FIGURE: VIETNAM'S 3D ANIMATED FEATURE FILM
FIGURE: VIETNAM'S SUCCESSFUL LOCAL ANIMATION PRODUCTION
TABLE: ORIGINAL ANIMATION CONTENT CREATED IN VIETNAM
FIGURE: VIETNAM'S 3D LOCAL ANIMATION PRODUCTION

TABLE: ORIGINAL ANIMATION CONTENT CREATED IN VIETNAM
TABLE: LEADING ANIMATION STUDIOS IN VIETNAM
FIGURE: NUMBER OF ANIMATION STUDIOS IN VIETNAM
FIGURE: ANIMATION STUDIOS IN VIETNAM BASED ON SIZE
FIGURE: ANIMATION STUDIOS IN VIETNAM BASED ON CAPABILITIES
FIGURE: ANIMATION STUDIOS IN VIETNAM BASED ON APPLICATIONS
FIGURE: PEOPLE EMPLOYED IN THE VIETNAMESE ANIMATION INDUSTRY
FIGURE: COST OF PRODUCING ONE EPISODE OF ANIMATION IN VIETNAM
FIGURE: MINUTES OF ANIMATION CONTENT PRODUCED IN VIETNAM
FIGURE: BREAK-UP OF ANIMATION CONTENT PRODUCED IN VIETNAM
FIGURE: 3D ANIMATION SALARIES IN VIETNAM
FIGURE: 2D ANIMATION SALARIES IN VIETNAM
FIGURE: WEB & MOBILE ANIMATION SALARIES IN VIETNAM
FIGURE: GAMING SALARIES IN VIETNAM
TABLE: IMPACT OF COVID-19 ON THAILAND'S ANIMATION & VFX
FIGURE: THAILAND'S FIRST ANIMATED FEATURE
TABLE: ORIGINAL ANIMATION CONTENT CREATED IN THAILAND
FIGURE: THAILAND'S FIRST 3D ANIMATED FEATURE FILM
FIGURE: THAILAND'S 2D ANIMATED FEATURE FILM
FIGURE: THAILAND'S SUCCESSFUL LOCAL ANIMATION PRODUCTION
TABLE: LEADING ANIMATION STUDIOS IN THAILAND
FIGURE: NUMBER OF ANIMATION STUDIOS IN THAILAND
FIGURE: ANIMATION STUDIOS IN THAILAND BASED ON SIZE
FIGURE: ANIMATION STUDIOS IN THAILAND BASED ON CAPABILITIES
FIGURE: ANIMATION STUDIOS IN THAILAND BASED ON APPLICATIONS
FIGURE: PEOPLE EMPLOYED IN THE THAILAND ANIMATION INDUSTRY
FIGURE: COST OF PRODUCING ONE EPISODE OF ANIMATION IN THAILAND
FIGURE: MINUTES OF ANIMATION CONTENT PRODUCED IN THAILAND
FIGURE: BREAK-UP OF ANIMATION CONTENT PRODUCED IN THAILAND
FIGURE: 3D ANIMATION SALARIES IN THAILAND
FIGURE: 2D ANIMATION SALARIES IN THAILAND
FIGURE: WEB & MOBILE ANIMATION SALARIES IN THAILAND
FIGURE: GAMING SALARIES IN THAILAND
TABLE: SINGAPORE'S HOMEGROWN ANIMATION CONTENT
TABLE: IMPACT OF COVID-19 ON SINGAPORE'S ANIMATION & VFX
FIGURE: SINGAPORE'S SUCCESSFUL LOCAL ANIMATION PRODUCTION
FIGURE: NUMBER OF ANIMATION STUDIOS IN SINGAPORE
FIGURE: ANIMATION STUDIOS IN SINGAPORE BASED ON SIZE
FIGURE: ANIMATION STUDIOS IN SINGAPORE BASED ON CAPABILITIES

FIGURE: ANIMATION STUDIOS IN SINGAPORE BASED ON APPLICATIONS
FIGURE: PEOPLE EMPLOYED IN THE SINGAPORE ANIMATION INDUSTRY
FIGURE: COST OF PRODUCING ONE EPISODE OF ANIMATION IN SINGAPORE
FIGURE: MINUTES OF ANIMATION CONTENT PRODUCED IN SINGAPORE
FIGURE: BREAK-UP OF ANIMATION CONTENT PRODUCED IN SINGAPORE
FIGURE: 3D ANIMATION SALARIES IN SINGAPORE
FIGURE: 2D ANIMATION SALARIES IN SINGAPORE
FIGURE: WEB & MOBILE ANIMATION SALARIES IN SINGAPORE
FIGURE: GAMING SALARIES IN SINGAPORE
TABLE: SINGAPORE'S LEADING ANIMATION STUDIOS
TABLE: ANIMATION SCHOOLS IN SINGAPORE
TABLE: IMPACT OF COVID-19 ON AUSTRALIAN ANIMATION & VFX
FIGURE: AUSTRALIAN FILM ADMISSION STATISTICS
FIGURE: NUMBER OF SCREENS IN AUSTRALIA
FIGURE: BOX OFFICE REVENUES IN AUSTRALIA
FIGURE: AUSTRALIAN FILM ADMISSIONS PER CAPITA
FIGURE: AUSTRALIAN FILM PRODUCTIONS PER YEAR
FIGURE: THEATRE ADMISSIONS IN AUSTRALIA
FIGURE: TICKET PRICES IN AUSTRALIA
FIGURE: EARLY AUSTRALIAN ANIMATION PRODUCTIONS
TABLE: ANIMATION & VFX STUDIOS IN AUSTRALIA
TABLE: ANIMATION MOVIES IN AUSTRALIA
TABLE: ANIMATION SCHOOLS IN AUSTRALIA
FIGURE: NUMBER OF ANIMATION STUDIOS IN AUSTRALIA
FIGURE: BREAK-UP OF ANIMATION STUDIOS IN AUSTRALIA BASED ON SIZE
FIGURE: CLASSIFICATION OF ANIMATION STUDIOS IN AUSTRALIA BASED ON CAPABILITIES
FIGURE: BREAK-UP OF ANIMATION STUDIOS IN AUSTRALIA BASED ON APPLICATIONS
FIGURE: 3D ANIMATION SALARIES IN AUSTRALIA
FIGURE: 2D ANIMATION SALARIES IN AUSTRALIA
FIGURE: WEB & MOBILE ANIMATION SALARIES IN AUSTRALIA
FIGURE: GAMING SALARIES IN AUSTRALIA
TABLE: IMPACT OF COVID-19 ON MALAYSIAN ANIMATION & VFX
TABLE: MALAYSIA'S HOME GROWN ANIMATION CONTENT
FIGURE: MALAYSIA ANIMATION DOMESTIC BOX OFFICE
FIGURE: SUCCESSFUL ANIMATED MOVIES IN MALAYSIA
FIGURE: MALAYSIA'S FIRST 3D ANIMATED FEATURE FILM
FIGURE: NUMBER OF ANIMATION STUDIOS IN MALAYSIA

FIGURE: ANIMATION STUDIOS IN MALAYSIA BASED ON SIZE
FIGURE: ANIMATION STUDIOS IN MALAYSIA BASED ON CAPABILITIES
FIGURE: ANIMATION STUDIOS IN MALAYSIA BASED ON APPLICATIONS
FIGURE: PEOPLE EMPLOYED IN THE MALAYSIAN ANIMATION INDUSTRY
FIGURE: COST OF PRODUCING ONE EPISODE OF ANIMATION IN MALAYSIA
FIGURE: MINUTES OF ANIMATION CONTENT PRODUCED IN MALAYSIA
FIGURE: BREAK-UP OF ANIMATION CONTENT PRODUCED IN MALAYSIA
FIGURE: 3D ANIMATION SALARIES IN MALAYSIA
FIGURE: 2D ANIMATION SALARIES IN MALAYSIA
FIGURE: WEB & MOBILE ANIMATION SALARIES IN MALAYSIA
FIGURE: GAMING SALARIES IN MALAYSIA
TABLE: MALAYSIA'S LEADING ANIMATION STUDIOS
TABLE: MALAYSIA'S LEADING ANIMATION SCHOOLS
TABLE: IMPACT OF COVID-19 ON INDONESIAN ANIMATION & VFX
FIGURE: INDONESIA'S FIRST 3D ANIMATED FEATURE FILM
TABLE: INDONESIA'S HOME GROWN ANIMATION CONTENT
FIGURE: NUMBER OF ANIMATION STUDIOS IN INDONESIA
FIGURE: ANIMATION STUDIOS IN INDONESIA BASED ON SIZE
FIGURE: ANIMATION STUDIOS IN INDONESIA BASED ON CAPABILITIES
FIGURE: ANIMATION STUDIOS IN INDONESIA BASED ON APPLICATIONS
FIGURE: PEOPLE EMPLOYED IN THE INDONESIAN ANIMATION INDUSTRY
FIGURE: COST OF PRODUCING ONE EPISODE OF ANIMATION IN INDONESIA
FIGURE: MINUTES OF ANIMATION CONTENT PRODUCED IN INDONESIA
FIGURE: BREAK-UP OF ANIMATION CONTENT PRODUCED IN INDONESIA
FIGURE: 3D ANIMATION SALARIES IN INDONESIA
FIGURE: 2D ANIMATION SALARIES IN INDONESIA
FIGURE: WEB & MOBILE ANIMATION SALARIES IN INDONESIA
FIGURE: GAMING SALARIES IN INDONESIA
TABLE: INDONESIA'S LEADING ANIMATION STUDIOS
TABLE: IMPACT OF COVID-19 ON ISRAEL'S ANIMATION & VFX
FIGURE: ISRAEL'S FIRST 3D ANIMATED FEATURE FILM
FIGURE: NUMBER OF ANIMATION STUDIOS IN ISRAEL
FIGURE: ANIMATION STUDIOS IN ISRAEL BASED ON CAPABILITIES
FIGURE: ANIMATION STUDIOS IN ISRAEL BASED ON APPLICATIONS
FIGURE: PEOPLE EMPLOYED IN THE ISRAEL ANIMATION INDUSTRY
FIGURE: COST OF PRODUCING ONE EPISODE OF ANIMATION IN ISRAEL
FIGURE: MINUTES OF ANIMATION CONTENT PRODUCED IN ISRAEL
FIGURE: BREAK-UP OF ANIMATION CONTENT PRODUCED IN ISRAEL
FIGURE: 3D ANIMATION SALARIES IN ISRAEL

FIGURE: 2D ANIMATION SALARIES IN ISRAEL
FIGURE: WEB & MOBILE ANIMATION SALARIES IN ISRAEL
FIGURE: GAMING SALARIES IN ISRAEL
TABLE: ISRAEL'S LEADING ANIMATION STUDIOS
TABLE: IMPACT OF COVID-19 ON PAKISTAN'S ANIMATION & VFX
TABLE: PAKISTAN'S LEADING ANIMATION TRAINING SCHOOLS
FIGURE: PAKISTAN'S FIRST 3D ANIMATED FEATURE FILM
TABLE: PAKISTAN'S LEADING ANIMATION STUDIOS
FIGURE: NUMBER OF ANIMATION STUDIOS IN PAKISTAN
FIGURE: ANIMATION STUDIOS IN PAKISTAN BASED ON SIZE
FIGURE: ANIMATION STUDIOS IN PAKISTAN BASED ON CAPABILITIES
FIGURE: ANIMATION STUDIOS IN PAKISTAN BASED ON APPLICATIONS
FIGURE: PEOPLE EMPLOYED IN THE PAKISTAN ANIMATION INDUSTRY
FIGURE: COST OF PRODUCING ONE EPISODE OF ANIMATION IN PAKISTAN
FIGURE: MINUTES OF ANIMATION CONTENT PRODUCED IN PAKISTAN
FIGURE: BREAK-UP OF ANIMATION CONTENT PRODUCED IN PAKISTAN
FIGURE: 3D ANIMATION SALARIES IN PAKISTAN
FIGURE: 2D ANIMATION SALARIES IN PAKISTAN
FIGURE: WEB & MOBILE ANIMATION SALARIES IN PAKISTAN
FIGURE: GAMING SALARIES IN PAKISTAN
TABLE: IMPACT OF COVID-19 ON BANGLADESH'S ANIMATION & VFX
TABLE: BANGLADESH'S LEADING ANIMATION TRAINING SCHOOLS
FIGURE: BANGLADESH'S GLOBALLY SUCCESSFUL ANIMATED SHORT FILM
TABLE: BANGLADESH'S LEADING ANIMATION STUDIOS
FIGURE: NUMBER OF ANIMATION STUDIOS IN BANGLADESH
FIGURE: ANIMATION STUDIOS IN BANGLADESH BASED ON SIZE
FIGURE: ANIMATION STUDIOS IN BANGLADESH BASED ON CAPABILITIES
FIGURE: ANIMATION STUDIOS IN BANGLADESH BASED ON APPLICATIONS
FIGURE: PEOPLE EMPLOYED IN THE BANGLADESH ANIMATION INDUSTRY
FIGURE: COST OF PRODUCING ONE EPISODE OF ANIMATION IN BANGLADESH
FIGURE: MINUTES OF ANIMATION CONTENT PRODUCED IN BANGLADESH
FIGURE: BREAK-UP OF ANIMATION CONTENT PRODUCED IN BANGLADESH
FIGURE: 3D ANIMATION SALARIES IN BANGLADESH
FIGURE: 2D ANIMATION SALARIES IN BANGLADESH
FIGURE: WEB & MOBILE ANIMATION SALARIES IN BANGLADESH
FIGURE: GAMING SALARIES IN BANGLADESH
TABLE: IMPACT OF COVID-19 ON UAE'S ANIMATION & VFX
FIGURE: DUBAI'S FIRST 3D ANIMATED FEATURE FILM
TABLE: IMPACT OF COVID-19 ON SAUDI ARABIA'S ANIMATION & VFX

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