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Global 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,

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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 Global Animation & VFX was US$ XX billion in 2021

The market size of Global Animation & VFX Software was US$ XX billion in 2021

Most of the segments in the animation industry are growing at the rate of XX% YoY

The production cost per animation movie ranges anywhere between US$ XX to YY million

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

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

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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

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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?

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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 the 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

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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.

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Contents

EXECUTIVE SUMMARY

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

GLOBAL ANIMATION & VFX INDUSTRY

History and Evolution
Industry Differentiators
Industry Characteristics
ANIMATION INDUSTRY SUPPLY CHAIN
ROLE OF TECHNOLOGY
MERCHANDISING OPPORTUNITIES
KEY DISTRIBUTION CHANNELS FOR ANIMATION CONTENT
RISKS FACED BY ANIMATION STUDIOS
DEMAND DRIVERS OF ANIMATION INDUSTRY
DRIVERS FOR SUCCESS
ANIMATION FINANCIAL MODELS
EMERGING TECHNOLOGICAL PLATFORMS
EMERGING APPLICATION AREAS
Competitive Landscape Of Animation Studios
Global Animation & VFX Market Size & Opportunity
Market segmentation of Animation & VFX
Global Animation Studios: Distribution and Capabilities

ANIMATION & VFX MARKET SEGMENTS

Market Segmentation
2D ANIMATION
3D ANIMATION / COMPUTER GENERATED IMAGERY (CGI)
VISUAL EFFECTS (VFX)
WEB ANIMATION
Market Opportunity for 3D Animation/Computer Generated Imagery (CGI)
PRODUCING CGI ANIMATION
ADVANTAGES OF CGI ANIMATION
DISADVANTAGES OF CGI ANIMATION
INFLUENCE OF CGI ON 2D ANIMATION

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CHALLENGES FOR CGI ANIMATION
CRITICAL SUCCESS FACTORS FOR CGI PRODUCTIONS
Visual Effects (VFX)
VFX INDUSTRY CHALLENGES & OPPORTUNITIES
Stop Motion Animation
Motion Capture
3D Animation Movies
KEY TRENDS, OPPORTUNITIES, FORECASTS

ANIMATION STREAMING VIDEO ON DEMAND

Market Size
NETFLIX
DISNEY+
HBO MAX
AMAZON PRIME VIDEO
HULU
APPLE TV+
PEACOCK
CRUNCHYROLL
QUIBI

EMERGING TRENDS & FUTURE OF ANIMATION & VFX

Key predictions for the future

GLOBAL TELEVISION ANIMATION CONTENT DEMAND

Television Animation Contentdemand in Europe
Television Animation Content demand in the United States
Television Animation Content demand in Asia
Television Animation Content demand in South America
Television Animation Content demand in Rest of the World
Global Television Animation Content demand

ANIMATION & VFX SOFTWARE MARKET

Animation Software Market Segments
2D Animation Software Market

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INDUSTRY OVERVIEW
Animation Workflow using 2D animation package
Analysis of key 2D Animation Softwares
3D Animation Software Market
INDUSTRY OVERVIEW
3D ANIMATION SOFTWARE MARKET SEGMENTS
FREE ANIMATION SOFTWARES
PLUG-INS TO PRODUCTS
Analysis of key players in 3D Animation & VFX Software Market
Analysis of key 3D Animation & VFX Softwares
Japanese Anime Production Softwares
PROMINENCE OF 2D
RETAS - SOFTWARE FOR ANIME PRODUCTION
MANGA STUDIO - SOFTWARE FOR MANGA PRODUCTION
Proprietary 3D Softwares of Animation studios
Collaboration between Animation Studios and Software Firms

ANIMATION & VFX CONTENT CREATION

Content Creation Workflow in 2D Animation
CONCEPTUALIZATION
PRE-PRODUCTION
PRODUCTION
POST-PRODUCTION
Content Creation Lead Time Calculation in 2D Animation
SCANNING AND FILTERING
INK AND PAINT
COMPOSITING AND DOPESHEET PREPARATION
Digital processing in 2D Animation
WORKFLOW PRECEEDING DIGITAL PROCESSING
Content Creation Workflow in 3D Animation
CONCEPTUALIZATION
PRE-PRODUCTION
PRODUCTION
POST-PRODUCTION
PARALLEL ACTIVITIES
Timeline of a 3D production workflow
ANIMATION SOFTWARE USAGE IN 3D PRODUCTION WORKFLOW
Animation Production Management

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GOVERNANCE
TASK DIVISION AND PEOPLE ALLOCATION
TECHNOLOGY
Cloud Computing in Animation & VFX Workflow

AUDIENCE DYNAMICS

Marketing Strategies for Animation Studios
MARKETING PROGRAM
ONLINE PRESENCE
PROFILING AND TARGETING THE RIGHT AUDIENCE
DISTRIBUTION
CONFERENCES, FESTIVALS & EVENTS
Strategies for Successful Animation Films
BEST PRACTICES IN CHARACTER DESIGN
LESSONS FROM PAST MISTAKES
Profile of a 3D Animation Studio: Pixar
PIXAR'S TECHNOLOGICAL ADVANTAGE

ECONOMICS OF ANIMATION & VFX

Revenue break-up across distribution channels
Marketing to Exhibition of Animation Content
MARKETING
LICENSING
MERCHANDISING
DISTRIBUTION
EXHIBITION
Economics of Animation Copyrights
DYNAMICS OF COPYRIGHTS

GUIDELINES FOR SETTING UP AN ANIMATION STUDIO

Investments Needed for Setting up an Animation Studio
Specialized Hardware and Software Investments
Leveraging Cloud Computing for Competitive Advantage

MANAGING AN ANIMATION STUDIO

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Key Issues of Concern
Formulating the long-term Strategy

ANIMATION CONTENT OUTSOURCING

Offshore Computer Animation Production
BUSINESS AND REVENUE MODELS
Drivers

EUROPE ANIMATION & VFX

Industry Overview
DEMAND FOR TV CONTENT
FEATURE FILM INDUSTRY IN EUROPE
MARKETING AND MERCHANDISING
Collaboration among European Studios
Drivers for Success
Trends in Europe

GERMANY ANIMATION & VFX

Industry Overview
IMPACT OF COVID-19 ON GERMAN ANIMATION & VFX
MARKET SIZE OF ANIMATION & VFX IN GERMANY
CHANGING STRATEGIES
KEY PLAYERS IN THE INDUSTRY

UK ANIMATION & VFX

Industry Overview
IMPACT OF COVID-19 ON UK ANIMATION & VFX
MARKET SIZE OF ANIMATION & VFX IN THE UK
INDUSTRY SUCCESS
KEY PLAYERS IN THE INDUSTRY

ITALY ANIMATION & VFX

Industry Overview
IMPACT OF COVID-19 ON ITALIAN ANIMATION & VFX

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MARKET SIZE OF ANIMATION & VFX IN ITALY
KEY PLAYERS IN THE INDUSTRY

FRANCE ANIMATION & VFX

Industry Overview
IMPACT OF COVID-19 ON FRENCH ANIMATION & VFX
MARKET SIZE OF ANIMATION & VFX IN FRANCE
KEY PLAYERS IN THE INDUSTRY

SPAIN ANIMATION & VFX

Industry Overview
IMPACT OF COVID-19 ON SPANISH ANIMATION & VFX
MARKET SIZE OF ANIMATION & VFX IN SPAIN
KEY PLAYERS IN THE INDUSTRY

NORTH AMERICAN ANIMATION & VFX

UNITED STATES ANIMATION & VFX

IMPACT OF COVID-19 ON AMERICAN ANIMATION & VFX
KEY TRENDS IN THE AMERICAN ANIMATION & VFX INDUSTRY
MARKET SIZE OF AMERICAN ANIMATION & VFX
PRODUCTION AND POST-PRODUCTION MARKET
KEY TRENDS
ANIMATION VALUE CHAIN IN THE UNITED STATES
CHALLENGES

CANADA ANIMATION & VFX

Industry Overview
IMPACT OF COVID-19 ON CANADIAN ANIMATION & VFX
INDUSTRY DRIVERS
MARKET SIZE OF ANIMATION & VFX IN CANADA
ANIMATION FUNDING
CHALLENGES
STRATEGIES FOR ANIMATION STUDIOS IN CANADA
ANIMATION STUDIOS IN CANADA

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ASIA-PACIFIC ANIMATION & VFX

ANIMATION OUTSOURCING TO ASIA
LOCAL CONTENT PRODUCTIONS
TREND TOWARDS ANIMATION CO-PRODUCTIONS IN ASIA
POPULARITY OF FOREIGN ANIMATION
CONTROVERSIES SURROUNDING FOREIGN ANIMATION
ANIMATION IN ASIAN SOCIETIES
SUCCESSFUL BUSINESS MODELS
ANIMATION STUDIOS IN ASIA
Asia-Pacific Video Games Industry
KEY TRENDS IN THE VIDEO GAMES INDUSTRY IN ASIA
VIDEO GAMES INDUSTRY STRUCTURE IN ASIA
VIDEO GAME BUSINESS MODELS IN ASIA
ONLINE VIDEO GAMING BUSINESS MODELS IN ASIA
VIDEO GAMES INDUSTRY VALUE CHAIN IN ASIA
MOBILE GAMES INDUSTRY VALUE CHAIN IN ASIA
Key Opportunities & Strategies
Asia-Pacific Video Games Market Segments
MOBILE VIDEO GAMES SEGMENTS & GENRES IN ASIA

JAPAN ANIMATION & VFX

Industry Overview
IMPACT OF COVID-19 ON JAPANESE ANIMATION & VFX
KEY TRENDS
MARKET OVERVIEW
COLLABORATION BETWEEN JAPANESE AND OVERSEAS STUDIOS
OUTSOURCING TO OTHER COUNTRIES
SUCCESSFUL BUSINESS MODELS
CHALLENGES
ANIME EXPORTS
OVERSEAS INFLUENCE OF ANIME
GLOBALLY SUCCESSFUL JAPANESE ANIMES
JAPANESE ANIME PRODUCTION MODELS
EMERGING TRENDS
ANIMATION STUDIOS IN JAPAN

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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
CURRENT STATE OF THE INDUSTRY
GOVERNMENT SUPPORT
COLLABORATION WITH OVERSEAS PARTNERS
EMERGING TRENDS IN THE INDUSTRY
LOCAL CONTENT DEVELOPMENT
CHALLENGES
MARKET SIZE OF KOREAN ANIMATION INDUSTRY
FUTURE OUTLOOK
ANIMATION SCHOOLS IN KOREA
ANIMATION STUDIOS IN KOREA

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
STRATEGIES FOR ANIMATION STUDIOS IN CHINA
THE RISKS
OVERSEAS EXPANSION

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FUTURE OUTLOOK
ANIMATION STUDIOS IN CHINA

AUSTRALIA ANIMATION & VFX

Industry Overview
IMPACT OF COVID-19 ON AUSTRALIAN ANIMATION & VFX
RECENT MOVIE TRENDS IN AUSTRALIA
INDUSTRY EVOLUTION AND KEY ANIMATION PRODUCTIONS
CHALLENGES
GOVERNMENT SUPPORT
STRATEGIES FOR ANIMATION STUDIOS IN AUSTRALIA
ANIMATION STUDIOS IN AUSTRALIA
ANIMATION MOVIES IN AUSTRALIA
ANIMATION SCHOOLS IN AUSTRALIA

AFRICA ANIMATION & VFX

SOUTH AFRICA ANIMATION & VFX

Industry Overview
IMPACT OF COVID-19 ON SOUTH AFRICAN ANIMATION & VFX
KEY TRENDS IN SOUTH AFRICAN ANIMATION INDUSTRY
INDUSTRY DRIVERS
CHALLENGES
INDUSTRY OPPORTUNITIES
ANIMATION STUDIOS IN SOUTH AFRICA
STRATEGIES FOR ANIMATION STUDIOS IN SOUTH AFRICA
DATA ON ANIMATION STUDIOS IN SOUTH AFRICA

NIGERIA ANIMATION & VFX

Industry Overview
IMPACT OF COVID-19 ON NIGERIAN ANIMATION & VFX
NIGERIAN ANIMATION INDUSTRY TRENDS
INDUSTRY DRIVERS
CHALLENGES
INDUSTRY OPPORTUNITIES
ANIMATION STUDIOS IN NIGERIA

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ANIMATION SCHOOLS NIGERIA
STRATEGIES FOR ANIMATION STUDIOS IN NIGERIA
DATA ON ANIMATION STUDIOS IN NIGERIA

EGYPT ANIMATION & VFX

Industry Overview
EGYPT'S FIRST ANIMATED FEATURE FILM
INDUSTRY DRIVERS
CHALLENGES
INDUSTRY OPPORTUNITIES
ANIMATION STUDIOS IN EGYPT
STRATEGIES FOR ANIMATION STUDIOS IN EGYPT

MOROCCO ANIMATION & VFX

Industry Overview
ANIMATION FESTIVALS AND COMMUNITIES
INDUSTRY DRIVERS
CHALLENGES
INDUSTRY OPPORTUNITIES

KENYA ANIMATION & VFX

Industry Overview
INDUSTRY DRIVERS
CHALLENGES
INDUSTRY OPPORTUNITIES
ANIMATION STUDIOS IN KENYA
STRATEGIES FOR ANIMATION STUDIOS IN KENYA

ALGERIA ANIMATION & VFX

Industry Overview
INDUSTRY DRIVERS
CHALLENGES
INDUSTRY OPPORTUNITIES

SENEGAL ANIMATION & VFX

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ZIMBABWE ANIMATION & VFX

KEY CHALLENGES FACED BY THE INDUSTRY IN ZIMBABWE
KEY RECOMMENDATIONS FOR THE ANIMATION INDUSTRY IN ZIMBABWE

NIGER ANIMATION & VFX

IVORY COAST ANIMATION & VFX

GHANA ANIMATION & VFX

CONGO ANIMATION & VFX

BURKINA FASO ANIMATION & VFX

MIDDLE EAST ANIMATION & VFX

Emergence of the Middle Eastern Animation
IMPACT OF COVID-19 ON MIDDLE EAST ANIMATION & VFX
KEY INDUSTRY TRENDS
LOCAL CONTENT CREATION

UNITED ARAB EMIRATES ANIMATION & VFX

Industry Overview
GOVERNMENT SUPPORT
INTERNATIONAL COLLABORATION
DUBAI'S FIRST 3D ANIMATED FEATURE FILM

SAUDI ARABIA ANIMATION & VFX

Industry Overview
GOVERNMENT SUPPORT
STRATEGIES FOR INDUSTRY GROWTH

LATIN AMERICA ANIMATION & VFX

ARGENTINA ANIMATION & VFX

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Industry Overview
IMPACT OF COVID-19 ON ARGENTINA'S ANIMATION & VFX
KEY TRENDS IN ARGENTINA'S ANIMATION INDUSTRY
INDUSTRY DRIVERS
CHALLENGES
INDUSTRY OPPORTUNITIES
ANIMATION STUDIOS IN ARGENTINA
ANIMATION SCHOOLS IN ARGENTINA
STRATEGIES FOR ANIMATION STUDIOS IN ARGENTINA
DATA ON ANIMATION STUDIOS IN ARGENTINA

BRAZIL ANIMATION & VFX

Industry Overview
IMPACT OF COVID-19 ON BRAZIL'S ANIMATION & VFX
KEY TRENDS IN THE BRAZILIAN ANIMATION INDUSTRY
INDUSTRY DRIVERS
CHALLENGES
INDUSTRY OPPORTUNITIES
ANIMATION STUDIOS IN BRAZIL
ANIMATION SCHOOLS IN BRAZIL
STRATEGIES FOR ANIMATION STUDIOS IN BRAZIL
DATA ON ANIMATION STUDIOS IN BRAZIL

MEXICO ANIMATION & VFX

Industry Overview
IMPACT OF COVID-19 ON MEXICO'S ANIMATION & VFX
KEY TRENDS IN MEXICAN ANIMATION INDUSTRY
CHALLENGES
INDUSTRY OPPORTUNITIES
INDUSTRY DRIVERS
MOVIE TRENDS IN MEXICO
STRATEGIES FOR ANIMATION STUDIOS IN MEXICO
DATA ON ANIMATION STUDIOS IN MEXICO

COLOMBIA ANIMATION & VFX

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Industry Overview
IMPACT OF COVID-19 ON COLOMBIA'S ANIMATION & VFX
KEY TRENDS IN THE COLOMBIAN ANIMATION & VFX INDUSTRY
ANIMATION STUDIOS IN COLOMBIA
INDUSTRY DRIVERS
CHALLENGES
INDUSTRY OPPORTUNITIES
STRATEGIES FOR ANIMATION STUDIOS IN COLOMBIA
DATA ON ANIMATION STUDIOS IN COLOMBIA

CHILE ANIMATION & VFX

Industry Overview
IMPACT OF COVID-19 ON CHILE'S ANIMATION & VFX
KEY INDUSTRY TRENDS
DRIVERS
CHALLENGES
OPPORTUNITIES
STRATEGIES FOR ANIMATION STUDIOS IN CHILE
KEY STATISTICS ABOUT ANIMATION INDUSTRY IN CHILE

CARIBBEAN ANIMATION & VFX

JAMAICA ANIMATION & VFX

Industry Overview
KEY CHALLENGES FACED BY THE INDUSTRY IN JAMAICA
KEY RECOMMENDATIONS FOR THE ANIMATION INDUSTRY IN ZIMBABWE

Figures and Tables

TABLE: IMPACT OF COVID-19 ON GLOBAL ANIMATION & VFX
FIGURE: EARLY ANIMATIONS
TABLE: ANIMATION MOVIES ADAPTED FROM TELEVISION
FIGURE: ANIMATION INDUSTRY ACTIVITY FLOW
FIGURE: ANIMATION & VFX INDUSTRY SUPPLY CHAIN
FIGURE: EARLY CGI BASED ANIMATIONS
TABLE: LIVE ACTION MOVIES FEATURING CGI CHARACTERS
TABLE: TOP GROSSING ANIMATION MOVIES

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FIGURE: MARKET SIZE OF GLOBAL ANIMATION, VFX AND VIDEO GAMES
FIGURE: BREAK-UP OF GLOBAL ANIMATION, VFX AND VIDEO GAMES INDUSTRY
FIGURE: MARKET SIZE OF GLOBAL ANIMATION & VFX INDUSTRY
FIGURE: MARKET SIZE OF GLOBAL VIDEO GAMES INDUSTRY
FIGURE: GEOGRAPHICAL BREAK-UP OF GLOBAL ANIMATION, VFX & VIDEO GAMES INDUSTRY
FIGURE: GEOGRAPHICAL BREAK-UP OF GLOBAL ANIMATION & VFX INDUSTRY
FIGURE: MARKET SEGMENTS OF ANIMATION, VFX & VIDEO GAMES INDUSTRY
FIGURE: GLOBAL ANIMATION, VFX & VIDEO GAMING INDUSTRY SEGMENTS
FIGURE: MARKET SIZE OF ANIMATION & VFX IN MOVIES & TELEVISION
FIGURE: MARKET SIZE OF ANIMATION & VFX IN MANUFACTURING
FIGURE: MARKET SIZE OF ANIMATION & VFX IN ARCHITECTURE & ENGINEERING
FIGURE: MARKET SIZE OFANIMATION & VFX IN EDUCATION
FIGURE: MARKET SIZE OF ANIMATION IN MEDICAL, HEALTHCARE & SCIENTIFIC
FIGURE: MARKET SIZE OF ANIMATION & VFX IN GOVERNMENT & DEFENCE
FIGURE: MARKET SIZE OF ANIMATION & VFX IN MARKETING & ADVERTISING
FIGURE: GEOGRAPHIC DISTRIBUTION OF ANIMATION STUDIOS IN THE WORLD
FIGURE: BREAK-UP OF ANIMATION STUDIOS BASED ON CAPABILITIES
TABLE: MOST INFLUENTIAL ANIMATION STUDIOS OF ALL TIME
TABLE: ANIMATED FEATURE FILMS FROM PROMINENT STUDIOS
FIGURE: BREAK-UP OF GLOBAL ANIMATION & VFX MARKET BY PRODUCTION TECHNIQUES
TABLE: TOP ANIMATION MOVIE FRANCHISES
TABLE: TOP GROSSING CGI ANIMATION MOVIES OF ALL TIME
TABLE: 3D ANIMATION / CGI FEATURE FILMS
TABLE: LIVE ACTION MOVIES WITH CGI MAIN CHARACTERS
TABLE: PROMINENT STOP MOTION ANIMATION MOVIES
TABLE: PROMINENT MOTION CAPTURE MOVIES
FIGURE: GLOBAL BOX OFFICE REVENUES OF 3D MOVIES
FIGURE: BOX OFFICE REVENUES OF 3D MOVIES IN NORTH AMERICA
FIGURE: GROWTH OF GLOBAL 3D SCREENS
FIGURE: NUMBER OF 3D MOVIES RELEASED GLOBALLLY
TABLE: PROMINENT 3D MOVIES
TABLE: TOP GROSSING 3D ANIMATION MOVIES OF ALL TIMES
TABLE: 3D ANIMATION MOVIES IN THE TOP 20 GROSSING MOVIES
FIGURE: GLOBAL STREAMING VIDEO MARKET SIZE
FIGURE: GLOBAL ANIMATION & VFX STREAMING VIDEO MARKET SIZE
TABLE: MINUTES OF TELEVISION ANIMATION CONTENT DEMAND IN EUROPE

+44 20 8123 2220
info@marketpublishers.com

FIGURE: MINUTES OF 2D/3D TELEVISION ANIMATION CONTENT DEMAND IN EUROPE
FIGURE: CABLE TV WATCHING PATTERN IN THE US
TABLE: MINUTES OF TELEVISION ANIMATION CONTENT DEMAND IN THE UNITED STATES
FIGURE: MINUTES OF 2D/3D TELEVISION ANIMATION CONTENT DEMAND IN THE US
TABLE: MINUTES OF TELEVISION ANIMATION CONTENT DEMAND IN ASIA
FIGURE: MINUTES OF 2D/3D TELEVISION ANIMATION CONTENT DEMAND BY IN ASIA
TABLE: MINUTES OF TELEVISION ANIMATION CONTENT DEMAND IN SOUTH AMERICA
FIGURE: MINUTES OF 2D/3D TELEVISION ANIMATION CONTENT DEMAND IN SOUTH AMERICA
TABLE: MINUTES OF TELEVISION ANIMATION CONTENT DEMAND FROM REST OF THE WORLD
FIGURE: MINUTES OF 2D/3D TELEVISION ANIMATION CONTENT DEMAND FROM REST OF THE WORLD
TABLE: MINUTES OF TELEVISION ANIMATION CONTENT DEMAND WORLDWIDE
FIGURE: MINUTES OF 2D/3D TELEVISION ANIMATION CONTENT DEMAND GLOBALLY
FIGURE: COMMERCIAL ANIMATION SOFTWARE MARKET SIZE
FIGURE: ANIMATION SOFTWARE MARKET BREAK-UP BY SEGMENTS
TABLE: CLASSIFICATION OF ANIMATION SOFTWARE
TABLE: KEY PLAYERS AND THEIR PRODUCTS IN 2D ANIMATION SOFTWARE MARKET
TABLE: LEADING 2D AND 3D ANIMATION SOFTWARES
TABLE: LEADING 3D ANIMATION SOFTWARES BY APPLICATION & OPERATING SYSTEM
TABLE: KEY PLAYERS AND THEIR PRODUCTS IN 3D ANIMATION SOFTWARE MARKET
TABLE: FREE ANIMATION SOFTWARES
TABLE: PRICING STRUCTURES OF KEY ANIMATION SOFTWARE PACKAGES
TABLE: COMPARISON OF KEY 3D ANIMATION SOFTWARE
FIGURE: 2D ANIMATION PRODUCTION WORKFLOW
FIGURE: 3D ANIMATION PRODUCTION WORKFLOW
FIGURE: 3D ANIMATION WORKFLOW
FIGURE: KEY GLOBAL ANIMATION EVENTS
FIGURE: PIXAR’S PRODUCTIONS

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FIGURE: ANIMATION MOVIE MARKETING COST BREAK-UP
TABLE: LEADING GLOBAL ANIMATION LICENSORS AND LICENSED PROPERTIES
TABLE: COST BREAK-UPS OF LEADING ANIMATION MOVIES
TABLE: CAPITAL EXPENDITURE FOR SETTING UP AN ANIMATION STUDIO
TABLE: PROFILE OF EMPLOYEES REQUIRED TO MANAGE THE STUDIO
FIGURE: MARKET SIZE OF ANIMATION & VFX IN EUROPE
TABLE: LEADING EUROPEAN ANIMATION FILMS BY THEATRE ADMISSIONS
TABLE: IMPACT OF COVID-19 ON GERMAN ANIMATION & VFX
FIGURE: MARKET SIZE OF ANIMATION & VFX INDUSTRY IN GERMANY
TABLE: LEADING ANIMATION & VFX STUDIOS IN GERMANY
TABLE: IMPACT OF COVID-19 ON UK ANIMATION & VFX
FIGURE: SIZE OF ANIMATION & VFX INDUSTRY IN THE UK
TABLE: LEADING ANIMATION & VFX STUDIOS IN THE UK
TABLE: IMPACT OF COVID-19 ON ITALIAN ANIMATION & VFX
FIGURE: SIZE OF ANIMATION & VFX INDUSTRY IN ITALY
TABLE: ANIMATION & VFX STUDIOS IN ITALY
TABLE: IMPACT OF COVID-19 ON FRENCH ANIMATION & VFX
FIGURE: SIZE OF ANIMATION & VFX INDUSTRY IN FRANCE
TABLE: ANIMATION & VFX STUDIOS IN FRANCE
TABLE: IMPACT OF COVID-19 ON SPANISH ANIMATION & VFX
FIGURE: SIZE OF ANIMATION INDUSTRY IN SPAIN
TABLE: ANIMATION & VFX STUDIOS IN SPAIN
TABLE: IMPACT OF COVID-19 ON AMERICAN ANIMATION & VFX
FIGURE: MARKET SIZE OF ANIMATION & VFX INDUSTRY IN THE UNITED STATES
TABLE: LEADING ANIMATION STUDIOS IN THE UNITED STATES
TABLE: LEADING ANIMATION TV CHANNELS IN THE UNITED STATES
FIGURE: 3D ANIMATION SALARIES IN THE UNITED STATES
FIGURE: 2D ANIMATION SALARIES IN THE UNITED STATES
FIGURE: WEB & MOBILE ANIMATION SALARIES IN THE UNITED STATES
FIGURE: VIDEO GAMES SALARIES IN THE UNITED STATES
TABLE: IMPACT OF COVID-19 ON CANADIAN ANIMATION & VFX
FIGURE: MARKET SIZE OF ANIMATION & VFX INDUSTRY IN CANADA
TABLE: ANIMATION & VFX STUDIOS IN CANADA
FIGURE: NUMBER OF ANIMATION STUDIOS IN CANADA
FIGURE: BREAK-UP OF ANIMATION STUDIOS IN CANADA BASED ON SIZE
FIGURE: CLASSIFICATION OF ANIMATION STUDIOS IN CANADA BASED ON CAPABILITIES
FIGURE: BREAK-UP OF ANIMATION STUDIOS IN CANADA BASED ON APPLICATIONS

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FIGURE: 3D ANIMATION SALARIES IN CANADA
FIGURE: 2D ANIMATION SALARIES IN CANADA
FIGURE: WEB & MOBILE ANIMATION SALARIES IN CANADA
FIGURE: VIDEO GAMING SALARIES IN CANADA
TABLE: KEY ANIMATION STUDIOS IN ASIA
FIGURE: GAMES INDUSTRY REVENUES BY DEVICE TYPES IN ASIA
TABLE: IMPACT OF COVID-19 ON JAPANESE ANIMATION & VFX
TABLE: MOST POPULAR JAPANESE ANIMATION MOVIES
FIGURE: SIZE OF ANIMATION & VFX NDUSTRY IN JAPAN
FIGURE: SIZE OF ANIMATION & VFX NDUSTRY IN JAPAN
FIGURE: MINUTES OF TV ANIMATION PRODUCTION IN JAPAN
TABLE: LEADING ANIMATION & VFX STUDIOS IN JAPAN
TABLE: IMPACT OF COVID-19 ON KOREAN ANIMATION & VFX
TABLE: IN-HOUSE CONTENT DEVELOPED BY KOREAN ANIMATION STUDIOS
FIGURE: MARKET SIZE OF KOREAN ANIMATION & VFX
FIGURE: KOREA ANIMATION DOMESTIC BOX OFFICE
TABLE: ANIMATION SCHOOLS IN KOREA
TABLE: KOREA’S LEADING ANIMATION & VFX 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
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 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

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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
TABLE: IMPACT OF COVID-19 ON SOUTH AFRICAN ANIMATION & VFX
TABLE: ANIMATION & VFX STUDIOS IN SOUTH AFRICA
FIGURE: SOUTH AFRICA'S FIRST ANIMATED FEATURE FILM
FIGURE: SOUTH AFRICA'S 3D FEATURE FILM
FIGURE: NUMBER OF ANIMATION & VFX STUDIOS IN SOUTH AFRICA
FIGURE: BREAK-UP OF ANIMATION STUDIOS IN SOUTH AFRICA BASED ON SIZE
FIGURE: BREAK-UP OF ANIMATION STUDIOS IN SOUTH AFRICA BASED ON CAPABILITIES
FIGURE: CLASSIFICATION OF ANIMATION STUDIOS IN SOUTH AFRICA BASED ON APPLICATIONS
FIGURE: NUMBER OF PEOPLE EMPLOYED IN THE SOUTH AFRICAN ANIMATION INDUSTRY
FIGURE: COST PROJECTIONS OF PRODUCING ONE EPISODE OF ANIMATION IN SOUTH AFRICA
FIGURE: MINUTES OF ANIMATION CONTENT PRODUCED IN SOUTH AFRICA
FIGURE: BREAK-UP OF ANIMATION CONTENT OUTPUT OF SOUTH AFRICA
FIGURE: 3D ANIMATION SALARIES IN SOUTH AFRICA
FIGURE: 2D ANIMATION SALARIES IN SOUTH AFRICA
FIGURE: WEB & MOBILE ANIMATION SALARIES IN SOUTH AFRICA
FIGURE: GAMING SALARIES IN SOUTH AFRICA
TABLE: IMPACT OF COVID-19 ON NIGERIAN ANIMATION & VFX
FIGURE: NIGERIA'S DAWN OF THUNDER
FIGURE: NIGERIA ANIMATION PRODUCTIONS
TABLE: ANIMATION & VFX STUDIOS IN NIGERIA
TABLE: ANIMATION & VFX SCHOOLS IN NIGERIA
FIGURE: NUMBER OF ANIMATION & VFX STUDIOS IN NIGERIA
FIGURE: NUMBER OF PEOPLE EMPLOYED IN THE NIGERIAN ANIMATION INDUSTRY
FIGURE: COST PROJECTIONS OF PRODUCING ONE EPISODE OF ANIMATION IN NIGERIA
FIGURE: EARLIEST EGYPTIAN ANIMATION PRODUCTION
FIGURE: EGYPTIAN ANIMATION PRODUCTIONS
TABLE: ANIMATION & VFX STUDIOS IN EGYPT

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FIGURE: KENYAN ANIMATION PRODUCTIONS
TABLE: ANIMATION & VFX STUDIOS IN KENYA
FIGURE: SENEGALESE ANIMATION PRODUCTIONS
FIGURE: AFRICA'S FIRST ANIMATED FEATURE FILM
FIGURE: ZIMBABWEAN ANIMATION PRODUCTIONS
FIGURE: EARLY NIGER ANIMATION PRODUCTIONS
FIGURE: EARLY IVORY COAST ANIMATION PRODUCTIONS
FIGURE: GHANA'S ANIMATION PRODUCTIONS
FIGURE: CONGO ANIMATION PRODUCTIONS
FIGURE: EARLY BURKINA FASO ANIMATION PRODUCTIONS
TABLE: IMPACT OF COVID-19 ON MIDDLE EAST ANIMATION & VFX
FIGURE: DUBAI'S FIRST 3D ANIMATED FEATURE FILM
TABLE: IMPACT OF COVID-19 ON ARGENTINA'S ANIMATION & VFX
TABLE: ORIGINAL ANIMATION CONTENT CREATED IN ARGENTINA
TABLE: ANIMATION & VFX STUDIOS IN ARGENTINA
TABLE: ANIMATION SCHOOLS IN ARGENTINA
FIGURE: ARGENTINA'S FIRST 3D ANIMATED FEATURE FILM
FIGURE: NUMBER OF ANIMATION STUDIOS IN ARGENTINA
FIGURE: BREAK-UP OF ANIMATION STUDIOS IN ARGENTINA BASED ON SIZE
FIGURE: BREAK-UP OF ANIMATION STUDIOS IN ARGENTINA BASED ON CAPABILITIES
FIGURE: CLASSIFICATION OF ANIMATION STUDIOS IN ARGENTINA BASED ON APPLICATIONS
FIGURE: NUMBER OF PEOPLE EMPLOYED IN THE ARGENTINE ANIMATION INDUSTRY
FIGURE: COST PROJECTIONS OF PRODUCING ONE EPISODE OF ANIMATION WORK IN ARGENTINA
FIGURE: MINUTES OF ANIMATION CONTENT PRODUCED IN ARGENTINA
FIGURE: BREAK-UP OF ANIMATION CONTENT PRODUCED IN ARGENTINA
FIGURE: 3D ANIMATION SALARIES IN ARGENTINA
FIGURE: 2D ANIMATION SALARIES IN ARGENTINA
FIGURE: WEB & MOBILE ANIMATION SALARIES IN ARGENTINA
FIGURE: GAMING SALARIES IN ARGENTINA
TABLE: IMPACT OF COVID-19 ON BRAZIL'S ANIMATION & VFX
TABLE: ORIGINAL ANIMATION CONTENT CREATED IN BRAZIL
TABLE: ANIMATION & VFX STUDIOS IN BRAZIL
TABLE: ANIMATION &SCHOOLS IN BRAZIL
TABLE: ANIMATION FESTIVALS ANE EVENTS IN BRAZIL
FIGURE: BRAZIL'S FIRST CGI ANIMATED FEATURE FILM

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FIGURE: BRAZIL'S FIRST LOCALLY PRODUCED TV SERIES
FIGURE: NUMBER OF ANIMATION & VFX STUDIOS IN BRAZIL
FIGURE: BREAK-UP OF ANIMATION STUDIOS IN BRAZIL BASED ON SIZE
FIGURE: BREAK-UP OF ANIMATION STUDIOS IN BRAZIL BASED ON CAPABILITIES
FIGURE: CLASSIFICATION OF ANIMATION STUDIOS IN BRAZIL BASED ON APPLICATIONS
FIGURE: NUMBER OF PEOPLE EMPLOYED IN THE BRAZILIAN ANIMATION INDUSTRY
FIGURE: COST PROJECTIONS OF PRODUCING ONE EPISODE OF ANIMATION WORK IN BRAZIL
FIGURE: MINUTES OF ANIMATION CONTENT PRODUCED IN BRAZIL
FIGURE: BREAK-UP OF ANIMATION CONTENT PRODUCED IN BRAZIL
FIGURE: 3D ANIMATION SALARIES IN BRAZIL
FIGURE: 2D ANIMATION SALARIES IN BRAZIL
FIGURE: WEB & MOBILE ANIMATION SALARIES IN BRAZIL
FIGURE: GAMING SALARIES IN BRAZIL
TABLE: IMPACT OF COVID-19 ON MEXICO'S ANIMATION & VFX
TABLE: ORIGINAL ANIMATION CONTENT CREATED IN MEXICO
TABLE: COMMERCIALLY SUCCESSFUL MEXICAN FILM PRODUCTIONS
FIGURE: FEATURE FILMS IN MEXICO
FIGURE: NUMBER OF SCREENS IN MEXICO
FIGURE: BOX OFFICE REVENUES IN MEXICO
FIGURE: MEXICAN FILM ADMISSIONS PER CAPITA
FIGURE: MEXICAN FILM PRODUCTIONS PER YEAR
FIGURE: THEATRE ADMISSIONS IN MEXICO
FIGURE: TICKET PRICES IN MEXICO
TABLE: ANIMATION & VFX STUDIOS IN MEXICO
TABLE: ANIMATION SCHOOLS IN MEXICO
FIGURE: MEXICO'S FIRST 3D ANIMATED FEATURE FILM
FIGURE: NUMBER OF ANIMATION STUDIOS IN MEXICO
FIGURE: BREAK-UP OF ANIMATION STUDIOS IN MEXICO BASED ON SIZE
FIGURE: BREAK-UP OF ANIMATION STUDIOS IN MEXICO BASED ON CAPABILITIES
FIGURE: CLASSIFICATION OF ANIMATION STUDIOS IN MEXICO BASED ON APPLICATIONS
FIGURE: NUMBER OF PEOPLE EMPLOYED IN THE MEXICAN ANIMATION INDUSTRY
FIGURE: COST PROJECTIONS OF PRODUCING ONE EPISODE OF ANIMATION

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WORK IN MEXICO
FIGURE: MINUTES OF ANIMATION CONTENT PRODUCED IN MEXICO
FIGURE: BREAK-UP OF ANIMATION CONTENT PRODUCED IN MEXICO
FIGURE: 3D ANIMATION SALARIES IN MEXICO
FIGURE: 2D ANIMATION SALARIES IN MEXICO
FIGURE: WEB & MOBILE ANIMATION SALARIES IN MEXICO
FIGURE: GAMING SALARIES IN MEXICO
TABLE: IMPACT OF COVID-19 ON COLOMBIA'S ANIMATION & VFX
TABLE: KEY ANIMATION PRODUCTIONS IN COLOMBIA
TABLE: ANIMATION & VFX STUDIOS IN COLOMBIA
FIGURE: NUMBER OF ANIMATION STUDIOS IN COLOMBIA
FIGURE: BREAK-UP OF ANIMATION STUDIOS IN COLOMBIA BASED ON SIZE
FIGURE: BREAK-UP OF ANIMATION STUDIOS IN COLOMBIA BASED ON CAPABILITIES
FIGURE: CLASSIFICATION OF ANIMATION STUDIOS IN COLOMBIA BASED ON APPLICATIONS
FGURE: NUMBER OF PEOPLE EMPLOYED IN THE COLOMBIA ANIMATION INDUSTRY
FIGURE: COST PROJECTIONS OF PRODUCING ONE EPISODE OF ANIMATION WORK IN CHILE
FIGURE: MINUTES OF ANIMATION CONTENT PRODUCED IN COLOMBIA
FIGURE: BREAK-UP OF ANNUAL ANIMATION CONTENT PRODUCED IN COLOMBIA
FIGURE: 3D ANIMATION SALARIES IN COLOMBIA
FIGURE: 2D ANIMATION SALARIES IN COLOMBIA
FIGURE: WEB & MOBILE ANIMATION SALARIES IN COLOMBIA
FIGURE: GAMING SALARIES IN COLOMBIA
TABLE: IMPACT OF COVID-19 ON CHILE'S ANIMATION & VFX
FIGURE: ANIMATION SCHOOLS IN CHILE
FIGURE: BEAR STORY
FIGURE: PAPER PORT
TABLE: ANIMATION STUDIOS IN CHILE
FIGURE: NUMBER OF ANIMATION STUDIOS IN CHILE
FIGURE: NUMBER OF PEOPLE EMPLOYED IN THE CHILEAN ANIMATION INDUSTRY
FIGURE: COST OF PRODUCING ONE EPISODE OF ANIMATION WORK IN CHILE
FIGURE: MINUTES OF ANIMATION CONTENT PRODUCED IN CHILE
FIGURE: 3D ANIMATION SALARIES IN CHILE
FIGURE: 2D ANIMATION SALARIES IN CHILE

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FIGURE: WEB & MOBILE ANIMATION SALARIES IN CHILE
FIGURE: GAMING SALARIES IN CHILE
FIGURE: JAMAICA’S ANIMATION PRODUCTIONS

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