

Toei Animation Co., Ltd.

Evidence Index and Exhibits

.anime

Toei Animation Co., Ltd.

This document provides supporting evidence and sources for the recurrence, continuity, and future-development facts described in the response to Question 147. For Japanese-language sources, a statement of the relevant passage is provided alongside the original source material.

Index of Exhibits

Exhibit	Fact evidenced	Source and capture date
Q147-1	Anime Industry Report: annual editions 2009 to 2025	aja.gr.jp/jigyoku/chousa/sangyo_toukei
Q147-2	Broad anime market of JPY 3,840.7 billion for 2024, an all-time high, with the overseas market exceeding the domestic market	aja.gr.jp/info/2579 and AJA, AIR 2025 English summary published 26 Mar 2026
Q147-3	New Cool Japan Strategy, 4 June 2024: long-term content-industry development objectives	cao.go.jp/cool_japan/english/main_document_2024.pdf
Q147-4	METI strategy, 2025: five-year action plan toward 2033 w/dedicated anime chapter	meti.go.jp/shingikai/mono_info_service/entertainment_creative/pdf/20250624_1.pdf , section 3-2, pp. 21-23
Q147-5	AnimeJapan: current edition and announced future editions	anime-japan.jp/2025/ information archive
Q147-6	Tokyo Anime Award Festival 2026, the thirteenth edition, co-hosted by AJA with the Tokyo Metropolitan Government	animefestival.jp/ja/post/19891/ (3 June 2025)
Q147-7	Intellectual Property Strategic Program 2026: sector targets including anime overseas sales of JPY 6 trillion by 2033	cas.go.jp/jp/seisakukaigi/titeki2/260612/keikaku_all.pdf , p.117

Exhibit Q147-1 - Anime Industry Report Editions

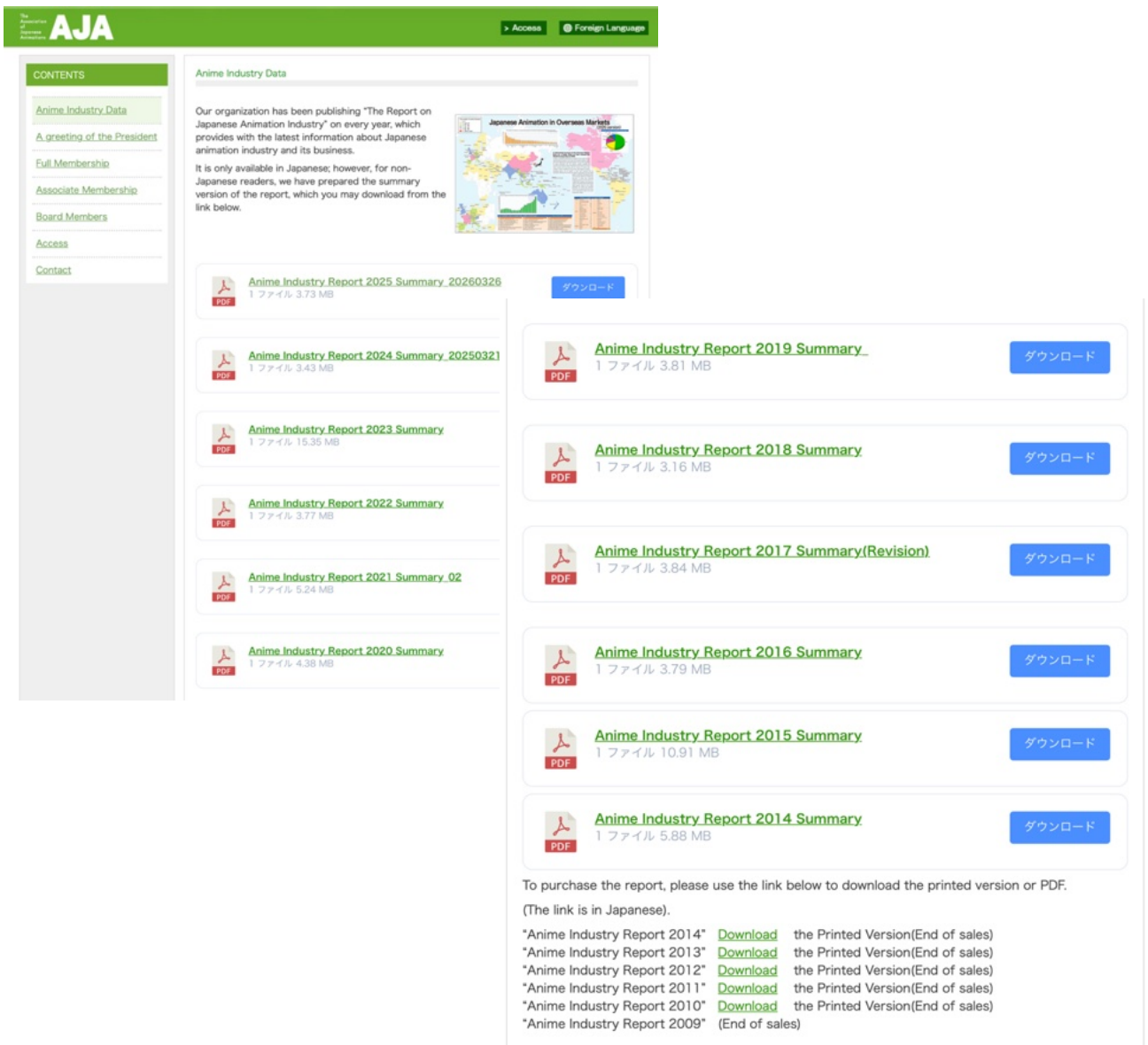
Fact evidenced. Anime Industry Report: annual editions 2009 to 2025

Source. Association of Japanese Animations, industry statistics page. (<https://aja.gr.jp/english/japan-anime-data>) Captured 4 August 2026.

(Original Japanese Editions of the Report: https://aja.gr.jp/jigyoku/chousa/sangyo_toukei)

Relevant passage. The page states that AJA's survey results are published annually as the Anime Industry Report and lists successive editions by year, each with a downloadable summary in English and Japanese.

Relevance to Question 147. This evidence establishes an unbroken annual publication series maintained by an organizing body for more than fifteen years. And shows the series is maintained in English for an international readership, weeks before the application submission period opened.



The screenshot displays the AJA website's 'Anime Industry Data' section. The header is green with the AJA logo and navigation links for 'Access' and 'Foreign Language'. A sidebar on the left lists various content items under the 'CONTENTS' heading. The main content area, titled 'Anime Industry Data', includes a descriptive paragraph about the report, a map of Japan, and a list of downloadable PDF summaries for each year from 2009 to 2025. Each entry shows the report title, a PDF icon, the number of files, and the file size. A blue 'ダウンロード' (Download) button is provided for each summary. At the bottom, there is a note about purchasing the report and a list of links to download printed versions for reports from 2009 to 2014.

Contents:

- Anime Industry Data
- A greeting of the President
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- Board Members
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Anime Industry Data

Our organization has been publishing "The Report on Japanese Animation Industry" on every year, which provides with the latest information about Japanese animation industry and its business.

It is only available in Japanese; however, for non-Japanese readers, we have prepared the summary version of the report, which you may download from the link below.

Downloadable Summaries:

- [Anime Industry Report 2025 Summary_20260326](#) (1 ファイル 3.73 MB) [ダウンロード](#)
- [Anime Industry Report 2024 Summary_20250321](#) (1 ファイル 3.43 MB)
- [Anime Industry Report 2023 Summary](#) (1 ファイル 15.35 MB)
- [Anime Industry Report 2022 Summary](#) (1 ファイル 3.77 MB)
- [Anime Industry Report 2021 Summary_02](#) (1 ファイル 5.24 MB)
- [Anime Industry Report 2020 Summary](#) (1 ファイル 4.38 MB)
- [Anime Industry Report 2019 Summary](#) (1 ファイル 3.81 MB) [ダウンロード](#)
- [Anime Industry Report 2018 Summary](#) (1 ファイル 3.16 MB) [ダウンロード](#)
- [Anime Industry Report 2017 Summary\(Revision\)](#) (1 ファイル 3.84 MB) [ダウンロード](#)
- [Anime Industry Report 2016 Summary](#) (1 ファイル 3.79 MB) [ダウンロード](#)
- [Anime Industry Report 2015 Summary](#) (1 ファイル 10.91 MB) [ダウンロード](#)
- [Anime Industry Report 2014 Summary](#) (1 ファイル 5.88 MB) [ダウンロード](#)

To purchase the report, please use the link below to download the printed version or PDF.
(The link is in Japanese).

Report Year	Download Link	Version
"Anime Industry Report 2014"	Download	the Printed Version(End of sales)
"Anime Industry Report 2013"	Download	the Printed Version(End of sales)
"Anime Industry Report 2012"	Download	the Printed Version(End of sales)
"Anime Industry Report 2011"	Download	the Printed Version(End of sales)
"Anime Industry Report 2010"	Download	the Printed Version(End of sales)
"Anime Industry Report 2009"		(End of sales)

Exhibit Q147-2 - Anime Industry Report 2025 and Industry Dynamics

Fact evidenced. Broad anime market of JPY 3,840.7 billion for 2024, an all-time high

Source. Association of Japanese Animations, flash results release for the Anime Industry Report 2025. Captured 4 August 2026. (https://aja.gr.jp/download/air2025samaru_en) (Japanese: <https://aja.gr.jp/info/2579>)

Relevant passage. The Japanese news release gives the broad anime market total for 2024 and identifies it as an all-time high. The English summary presents those facts with the headline referencing that the international market growth is driving the industry to an all-time high and gives overseas and domestic market figures for the reported year, with the overseas figure the larger of the two.

Relevance to Question 147. This evidence shows the community's field growing rather than merely persisting, as measured by the community's own statistical body and further supports the international character of the community's field, which bears directly on the case for a global namespace.

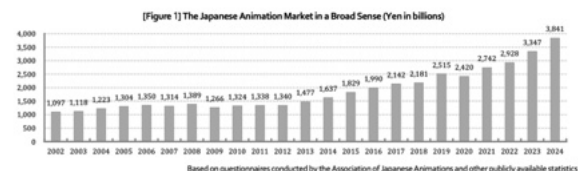
The International Market Has Been Driving the Anime Industry to Record Highs as It Nears 4 Trillion Yen

Anime is at the center of the global expansion of Japanese content, and the growth of the international market has driven the anime industry to record highs in 2024. It is expected to grow even further by developing the mixed media ecosystem for the international market. On the other hand, while the anime industry market is prosperous, it needs to cope with the shortage of human resources.

The 2024 Anime Industry Market (The Anime Market in a Broad Sense/End User Market Outline)

<The Anime Industry Market is Reaching 4 Trillion Yen: It's Reached 3.8 Trillion Yen, 114.8% of The Year Before>

In 2024, the anime industry market reached 114.8% of the previous year, an increase of 494.2 billion yen to reach 3.8 trillion yen, the highest profit on record. This is an increase from last year's record, and the second highest increase after 2019's (115.3%). The market has widened 2.1 times the size of 2015's market, and 3.5 times the size of 2002's. If this growth continues, there's a possibility that the market will break 4 trillion yen in 2025.



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

Item	2018	2019	2020	2021	2022	2023	2024	YoY
①TV	113.7	94.8	84.8	93.6	94.3	97.3	98.2	100.9%
②Movie	42.6	69.2	55.4	60.2	78.5	48.1	69.0	101.3%
③Video	58.7	56.3	46.6	66.2	38.5	36.2	38.4	106.1%
④Internet Distribution	39.5	48.1	93.0	154.3	165.2	250.1	265.5	106.2%
⑤Merchandising	509.3	596.8	581.9	663.1	669.3	700.8	748.8	106.8%
⑥Music	35.8	33.7	27.6	31.7	27.4	26.7	26.6	99.6%
⑦Overseas	1,009.2	1,200.9	1,239.4	1,313.4	1,459.2	1,722.2	2,170.2	126.0%
⑧The Package and the like	283.5	319.9	263.0	305.6	298.1	337.0	301.5	89.5%
⑨Live Entertainment	77.4	84.4	29.0	57.1	97.2	108.1	122.5	113.3%
Total	1,917.7	2,314.5	2,420.9	2,762.2	3,027.2	3,347.5	3,840.7	114.8%

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

<International is More than Half the Whole Market, While Merchandising is Close to Half of the Domestic Market with Streaming Taking Up More than Half of Video>

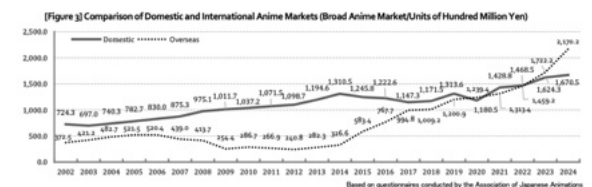
The anime industry market, meaning the anime industry in a broad sense, is moving the entire consumer market with household expenses playing a leading part, so it's assumed that the amount of anime-related goods were paid for by users. The market is split up into nine genres with the majority (56.5%) being occupied by ⑦ International, which is a reversal of the domestic and international markets that started in 2023. Domestically, ⑤ Merchandising is the biggest cut (51.5%

of the total market, 44.8% of the domestic market) followed by ⑧ Entertainment (7.9% of the total market, 18.0% of the domestic market), so the sales of rights usage is large. In the field of media, ④ Streaming and its sudden growth (6.9% of the total market, 15.9% of the domestic market) has overtaken the total sales of the three fields of ① TV, ② Film, and ③ Video.

<Will The Rapidly Progressing International Market Continue to Exceed the Domestic Market?>

The Japanese anime international market survived the COVID-19 pandemic and expanded to 2.1 trillion yen in 2024 (126.0% of the year before). During the COVID-19 pandemic, the global consumption from home of global streaming services such as Netflix, Disney+, and the international service Crunchyroll, which focuses on Japanese anime, expanded rapidly, which strengthened the overseas expansion of Japanese anime.

The domestic market fell into a slump in 2020 due to the COVID-19 pandemic, but in 2021, it bounced back to make 121.0% of the previous year and since then has continued a gentle increase. However, comparing the international and domestic markets, in 2023 the international market exceeded the domestic market by 97.9 billion yen, and in 2024, the difference expanded to 499.7 billion yen. The international market is clearly making rapid progress and it's predicted that the difference will only continue to expand due to the international advance of related businesses such as Merchandising, a category that takes up the greater part of the domestic market.



2024 Anime Industry Market (The Narrow Sense of the Anime Industry/General View of the Anime Production Industry)

<While the Anime Industry Market Made a New Record for the Third Year in a Row, Its Growth is Also Slowing Down>

In 2024, the anime industry market increased by 109.1%, which means an increase of 39 billion yen to reach 466.2 billion yen. Since recovering from the COVID-19 pandemic, it has broken records three years in a row. Also, the market in a broad sense has kept a growth rate of roughly 12.0% over the past ten years.

Exhibit Q147-3 - New Cool Japan Strategy

Fact evidenced. New Cool Japan Strategy, 4 June 2024: long-term content-industry development objectives

Source. Intellectual Property Strategy Headquarters, New Cool Japan Strategy, 4 June 2024. Official English text published by the Cabinet Office. Captured 4 August 2026. (Full downloadable PDF : https://www.cao.go.jp/cool_japan/english/main_document_2024.pdf)

Relevant passage. The announcement page (https://www.cao.go.jp/press/new_wave/20240806.html) to the left sets out national objectives for the content industry, of which anime forms part, over a long horizon. The full document describes that strategy.

Relevance to Question 147. This evidence shows an institution outside the community planning around the community's field on a decade-long horizon.

The screenshot shows the Japanese Cabinet Office website with the headline 「新たなクールジャパン戦略」を決定しました (We have decided on the 'New Cool Japan Strategy'). The date is 2024年8月6日 (August 6, 2024). The page features a large image of a Japanese torii gate and the text 「新たなクールジャパン戦略」を決定しました. Below the image, there is a section titled 「新たなクールジャパン戦略」を決定しました. The text describes the strategy's goals, including increasing the number of foreign visitors to Japan, promoting Japanese culture, and supporting the content industry. It also mentions the 'Cool Japan' brand and the 'Cool Japan' logo. The page includes a navigation bar at the top with links to various government departments and a footer with contact information for the Cabinet Office.

digital distribution and are now expanding overseas. Movies⁵ utilizing game characters and live-action movies with subtitles, which were long considered difficult to produce, have also become big hits⁶.

Consequently, the content industry has become a large business with a scale of 4.7 trillion yen⁷, rivaling the steel industry in export value and approaching the semiconductor industry⁸ in overseas development, and is now positioned as a key industry that earns a large amount of foreign currency.

In addition, "tour of related places,"⁹ in which foreign visitors to Japan visit places that have appeared in anime works or the birthplace of the original creator, has become popular, bringing a significant ripple effect to inbound tourism due to the popularity of anime content¹⁰.

The second change in the environment is that foreigners are increasingly expecting and interested in Japanese food.

Japanese food has become the biggest driving force¹¹ behind their visit to Japan, with ramen, curry, yakiniku, and onigiri gaining popularity in addition to the more typical sushi, tempura, etc. Furthermore, many foreign visitors to Japan often come to local auberges that offer "hospitality" with local products, even though they are located in areas where transportation is difficult.

The third change in the environment is the diversification and deepening of inbound tourism, with an increase in the number of foreigners who have visited Japan two or more times (repeaters)¹², as well as an increase in the length of their stay in Japan¹³.

Foreign visitors to Japan for the first time often visit the so-called "Golden Route" (Tokyo, Kyoto, Osaka) or tour famous tourist destinations. On the other hand, foreign visitors visiting Japan for the first time tend to value and pay more for the "experience" of visiting a single place or region for a long period of time to "taste it as it is" or "experience something unusual" rather than visiting a variety of

⁵ For instance, "The Super Mario Bros. Movie" grossed approximately 190.8 billion yen at the worldwide box office, making it the second-biggest animated film on record.

⁶ For instance, in the U.S., "GODZILLA MINUS ONE" became the No. 1 Japanese live-action film of all time at the U.S. box office and was selected for an Academy Award (Best Visual Effects).

⁷ Based on "Japan and Global Media × Content Market Database 2023" (Human Media Co., Ltd.)

⁸ The export figures for the steel industry and semiconductor industry are 5.1 trillion yen and 5.7 trillion yen, respectively (both in 2022). (Refer to Chart 6 for the source of each.)

⁹ It is sometimes referred to as a "pilgrimage to a sacred place" or "Set-jetting".

¹⁰ It is estimated that 1.15 million inbound tourists visited places related to anime and purchased 35 billion yen worth of anime-related goods. The potential demand for tours related to anime is estimated to be 2.6 million people, with an expected domestic expenditure of 400 billion yen. (Based on the 23rd Council of New Form of Capitalism Realization [October 25, 2023], Document 1).

¹¹ Regarding expectations before visiting Japan, "Eating Japanese food" has consistently ranked first (2023: 83.2%) since 2014. (Based on the "Survey on Trends in Consumption by Foreign Visitors to Japan" [Japan Tourism Agency (JTA)]).

¹² The number of foreign visitors to Japan has increased significantly from approximately 4.01 million (2011) to 20.47 million (2019). (Estimated based on "Statistics on Foreign Visitors to Japan" and "Survey on Consumption Trends of Foreign Visitors to Japan" [both by JTA]).

¹³ Regarding length of stay (sightseeing and leisure), the percentage of stays of 6 days or less has decreased (from 71.1% (2011) to 61.7% (2019), a decrease of 9.4 points) and the percentage of stays of 7 to 13 days has increased (from 20.0% (2011) to 30.7% (2019), an increase of 10.7 points) ("Trends in Foreign Visitor Consumption in Japan") (Based on "Survey of Trends in Foreign Visitor Consumption in Japan," [JTA]).

Exhibit Q147-4 - METI Entertainment and Creative Industry Strategy

Fact evidenced. METI strategy, 2025: five-year action plan toward 2033

Source. Ministry of Economy, Trade and Industry, Entertainment and Creative Industry Strategy, 24 June 2025. Captured 4 August 2026. (Full Document Download: https://www.meti.go.jp/shingikai/mono_info_service/entertainment_creative/20250624_report.html)

Relevant passage. The announcement states the strategy sets a five-year action plan directed at 2033 and includes a dedicated anime chapter setting out anime-specific actions. Pages 21-23 discuss the specifics for anime.

Relevance to Question 147. This evidence shows a government ministry treating anime as a distinct sector warranting its own program of action.

3-2. アニメ

【アクション①】更なる海外市場の獲得と多角的な IP 展開

現状・課題

- 配信メディアの拡大により世界中に展開されている日本のアニメは、豊富な IP を強みとして、新興国市場を中心に更なる海外需要の増加が見込まれている。
- 戦略的に海外展開を進めるためには、国・地域ごとの需要動向等の客観的データに基づき、多角的な IP 活用（グッズ・イベント等）を含めた展開方法を検討する必要があるが、需要動向等に関する客観的データや海外展開に関するノウハウ・コネクションを持つ人材は不足している。また、世界に通用する日本のアニメの発信や国際交流の促進等を積極的に行っていく必要がある。
- 国によっては、自国のコンテンツ産業や文化の保護等を目的とした検閲制度や総量制限等の規制が導入されている。
- 多様な国に展開する際には、宗教・文化・政治等の表現への配慮が必要となる場合がある。
- アニメ分野の海賊版（違法動画、違法商品）による被害は後を絶たず、海外市場での逸失利益が発生していることから、対応が必要である。

アクションプラン

- 官民で連携し、海外市場におけるアニメ作品の需要動向調査を行い、客観的なデータを整備する。
- パートナー獲得・資金調達、高品質な作品制作、ローカライズ・カルチャライズ（各国の文化に合わせた対応）・プロモーションの支援を通じてコンテンツの海外展開を支援する。
- 映像作品の国際共同製作や、グローバル視点のアワードを含む国際的イベントを推進する。
- 各国の規制動向について情報収集・整理し、提供するほか、必要に応じて民間企業と連携しつつ働きかけを行う。また、企業による海外展開戦略の立案やマーケティング、マーケティング等々を支援する。
- 海外市場の更なる獲得に向けた契約条件等の改善・透明化の推進に向けた取組を検討する。
- CODA 等と連携して違法アニメ動画対策強化に加え、アニメ産業の収益の多くを占めるアニメ関連のグッズについても、海賊版対策等を実施する。

【アクション②】若手人材の確保・育成の促進

現状・課題

- アニメの制作本数が増加する中、技術のあるクリエイターやアニメ制作の高度な現場管理を行い、海外市場を見据えた事業展開が出来るプロデューサー等の人材不足が深刻化している。これらの人材育成には時間がかかり、資金面においても制作会社の負担が大きい。
- これまで就業環境等に関する正しい発信が行われていなかったため、若手人材の参入の妨げとなっていた。

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アクションプラン

- ロケ地の聖地巡礼・地方スタジオの誘致など、アニメを用いた地方創生の在り方について実写を含めて検討し、フィルムコミッションを含む地域との協力についてガイドライン化を進めるとともに、モデルを全国に普及する。また、民間とも連携しながら、他分野を含めながら、我が国のコンテンツの象徴的拠点を形成すべく、議論を開始する。

【アクション⑤】制作工程の効率化

現状・課題

- 制作工程の効率化や高度化を目的として制作会社における先端技術の導入・デジタル化が進む一方、技術習熟度の格差や予算不足、手法やフォーマットが統一されていないといった課題がある。

アクションプラン

- 先端技術を用いたコンテンツ制作を支援する。

アクションプラン

- 「創風」により、スタートアップ及び若手クリエイターの人材育成を実施する。
- 産学官が連携し、制作会社における若手人材育成制度の拡大、業界全体のクリエイター・プロデューサー等の人材育成に資する支援制度や新たな人材育成スキームを構築する。

【アクション③】創作活動を支える環境整備を行うための収益力向上

現状・課題

- アニメ作品の需要増や海外動画配信プラットフォームの台頭により、制作予算は上がっているものの、その予算を上回る制作コストや制作会社に収益が還元されにくい業界構造により、現場の就業環境改善（賃上げ、処遇改善、人材育成、デジタル化等）に投入できる資金が不足し、人材が業界外へ流出する懸念がある。
- アニメ業界は多くの制作会社・クリエイターの関与が必要となる多層構造であり、フリーランスのクリエイターとの取引も多く、サプライチェーンも多様化していることから、様々な場面で取引の適正化が求められる。

アクションプラン

- 制作会社の収益増加を目指し、制作会社が製作委員会への参入や IP 活用等を行う作品に対して支援を行う。また、制作会社やその下請等に対する更なる利益還元や制作会社による多様な資金調達の在り方等について検討する。
- 制作会社が取引を行うテレビ局・配信業者等に対して労務費・原材料費・エネルギー費等の実態に合わせた価格転嫁の要請を行うとともに、フリーランス法の遵守の徹底、下請ガイドラインの普及啓発等を行う。
- 映画業界が作成した「映画制作の持続的な発展に向けた取引ガイドライン」（映画取引ガイドライン）を参考に、アニメ制作業界の就業環境改善・制作会社の強靱化に資する仕組み（アニメ適（仮称））の創設に向けた取組を進める。

【アクション④】地方を巻き込んだ産業振興

現状・課題

- アニメの舞台となった実在の地域（＝聖地）には国内外から多くの観光客が集まっている。例えば、江ノ電の鎌倉高校前駅の踏切は、「スラムダンク」の聖地として、多くの観光客が訪れている。一方で、こうした聖地においても、地域における経済効果としては限定的であり、改善の余地がある、との声もある。
- アニメ制作は一部の工程を海外に委託しているものの、多くの工程は国内で制作されており、近年は地方人材の活用等を目的に地方での制作スタジオ設立が増加している。
- 米国のハリウッドのように、コンテンツの制作に加えて、観光とも一体化した象徴的な地域がある一方、サウジアラビアでは同じくコンテンツの制作や観光を踏まえた「Qiddiya City」の立ち上げに関するプロジェクトがある。

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Exhibit Q147-5 - AnimeJapan Editions

Fact evidenced. AnimeJapan: current edition and announced future editions

Source. AnimeJapan, information and news archive. Captured 4 August 2026. English-language original. (<https://anime-japan.jp/en>)

Relevant passage. The archive records successive editions of the event and announces the following year's edition in advance of it being held.

Relevance to Question 147. This evidence shows cadence extending forward as well as backward, which distinguishes an enduring institution from a series that has merely happened to recur.

2026.3.30(Mon)

"AnimeJapan 2026"—the world's largest anime festival, featuring a record number of exhibitor booths—came to a spectacular close!

Now in its 13th year, AnimeJapan 2026 featured over 130 booths—the largest number in the event's history—and a total of 50 stage events held across four stages: the largest-ever RED Stage, as well as the GREEN, BLUE, and WHITE stages. The event attracted a large number of anime fans from both Japan and abroad.

Through exhibitors' displays, announcements, and stage events, the two-day event further solidified AnimeJapan's presence as a leading platform for promoting anime culture.



Total attendance reached a record high of over 156,000 people (estimated), bringing together more anime fans than ever before and truly embodying the slogan, "Everything about anime is here."

Information

2026.7.15(Wed)

AnimeJapan 2027 will be held!

AnimeJapan Organization is pleased to announce AnimeJapan 2027. Please see below for details.

▼Public day
Dates: March 27 [Sat] - March 28 [Sun] 2027
Venue: INTEx Osaka, Halls 2-6

▼Business Day
Dates: March 26 [Fri] - March 27 [Sat] 2027
Venue: INTEx Osaka, Hall 1

System Requirements

Privacy policy

Terms and Conditions for the Sale of Tickets

Share on SNS

Exhibit Q147-6 - Tokyo Anime Award Festival 2026

Fact evidenced. Tokyo Anime Award Festival 2026, the thirteenth edition, co-hosted by AJA with the Tokyo Metropolitan Government

Source. Tokyo Anime Award Festival, festival record. Captured 4 August 2026.
(<https://animefestival.jp/en/award/competition/archive/>)

Relevant passage. The ABOUT page gives the edition number for 2026 and identifies the co-hosting bodies. The Archive shows the winners for each year of the recurring event.

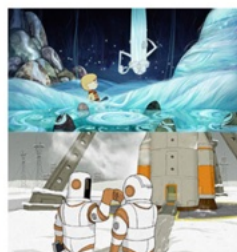
Relevance to Question 147. This evidence shows a recurring institution co-hosted by a community organizing body together with a public authority.



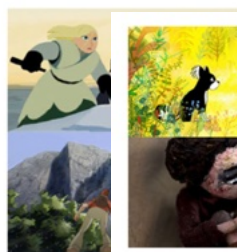
Title	Tokyo Anime Award Festival 2026
Date	March 13(Fri) - March 16(Mon), 2026
Place	Ikebukuro, Tokyo
Hosted by	Tokyo Anime Award Festival Executive Committee, The Association of Japanese Animations
Co-hosted by	Tokyo Metropolitan Government
Office	Tokyo Anime Award Festival Office info@animefestival.jp



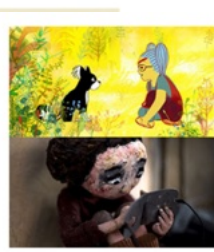
TAAF2014



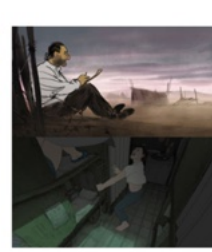
TAAF2015



TAAF2016



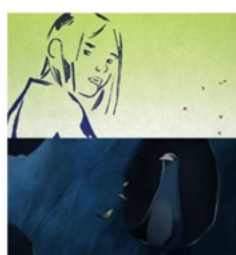
TAAF2020



TAAF2021



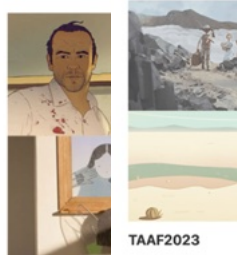
TAAF2022



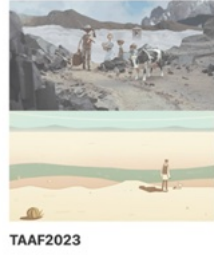
TAAF2017



TAAF2018



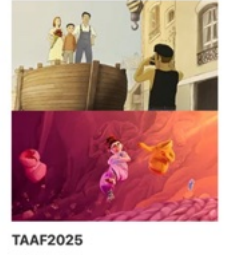
TAAF2019



TAAF2023



TAAF2024



TAAF2025

Exhibit Q147-7 - Intellectual Property Strategic Program 2026

Fact evidenced. Sector targets including anime overseas sales of JPY 6 trillion by 2033

Source. Intellectual Property Strategy Headquarters, Intellectual Property Strategic Program 2026, 12 June 2026, page 117. Captured 4 August 2026. (Full document download: https://www.cas.go.jp/jp/seisakukaigi/titeki2/260612/keikaku_all.pdf)

Relevant passage. The program sets sector-by-sector overseas sales targets for 2033; the anime figure appears in the sector table on the page reproduced.

Relevance to Question 147. This evidence shows the national government setting a specific numerical target for the community's field seven years beyond the date of this application.

が安心して持続的に働ける環境の整備を進めていくことが重要である。加えて、2025 年 12 月にはスマートフォンにおいて利用される特定ソフトウェアに係る競争の促進に関する法律が施行されたところであり、同法の運用等を通じた、公正かつ自由な競争環境を整備することは、コンテンツ業界におけるイノベーションを活性化させるためにも重要である。

＜コンテンツ分野官民投資ロードマップの着実な推進＞

2026 年 4 月、コンテンツ産業官民協議会における検討を踏まえ、政府による多角的・戦略的な供給力強化策を示す、コンテンツ分野における「官民投資ロードマップ」の素案を示した。

本ロードマップは、コンテンツの主要分野であるゲーム、アニメ、マンガ、音楽、実写（映画及び放送をいう。）について、大胆な政策パッケージによって民間投資を引き出すことで、企業による自律的・継続的な成長を実現する観点に立ち、「責任ある積極財政」の下で政策リソースを投じることを踏まえ、獲得すべき市場・戦略目標の設定・投資のコミットメントと、その実現に向けた「勝ち筋」の特定・共有を官民で連携して実施するものである。

また、当該政策パッケージにおいては、事業フェーズを踏まえた上で、需要・市場の創出・形成と新たな技術の社会実装を重視することとされており、例えば、ゲーム分野においては、既存の世界的知財の収益力向上とその収益を原資とした新規知財創出、AI・XR 等の先端技術を活用した開発基盤整備を通じ、モバイル・PC を含むグローバル市場での競争力強化を図ること、アニメ分野においては、海外で高い認知度を有する日本アニメを基盤に、大規模作品製作の推進や日系配信プラットフォームの国際展開により流通網を強化するとともに、制作会社の成果報酬率向上を通じた IP 再投資促進を図ること等が示されている。さらに、マンガ分野では、海賊版対策の強化や AI を活用したローカライズ体制の構築により正規流通を拡大すること、音楽分野では、アニメソング等を起点とした海外ファンダムの形成を通じ、配信・ライブ・グッズ等の収益拡大を図ること、実写分野では、外部資金調達も活用した大規模作品製作、VFX 等の高度制作基盤整備、日本企業が参画する配信プラットフォームの海外展開や国際共同製作を通じて、海外収益の拡大を進めることとされている。

これらを通じて 2033 年までに日本発コンテンツの海外売上を 20 兆円へ拡大することを目標とし、分野別にはゲーム分野 12 兆円、アニメ分野 6 兆円、マンガ分野 1 兆円、音楽分野 0.7 兆円、実写分野 0.5 兆円といった海外売上目標を設定したところである。

政府においては、本ロードマップを着実に進めていくため、各取組について進捗状況の管理等を適切に進めていく。その際、政策を継続的かつ一貫通貫で実施

Additional Sources

The following sources provide additional support for factual statements in the response to Question 147 that are not separately reproduced as exhibits above.

AnimeJapan Historical Continuity: AnimeJapan 2014 official site and AnimeJapan information/news archives. These records support the event's inauguration in 2014, subsequent annual editions, the cancellation of the 2020 edition during the COVID-19 pandemic, the online 2021 edition, and the resumption of in-person editions from 2022. (<https://anime-japan.jp/2014/en/>; <https://anime-japan.jp/2022/about>)

Tokyo Anime Award Festival Historical Continuity: Tokyo Anime Award Festival, "What is TAAF." (<https://animefestival.jp/en/about/about/>)

JAMRA Recurring Activities: Japan Merchandising Rights Association, activity and news records, 2024-2026. These records document recurring anti-counterfeiting outreach, rights-protection activities, industry seminars, and member exchange programs during each of the three years. (<https://jamra.org/>).

CODA Anti-Piracy Enforcement: Content Overseas Distribution Association activity records and enforcement releases, 2011-2026. These records support CODA's continuing coordinated enforcement activity and more than 5.4 million takedown requests from August 2011 through February 2026. (<https://coda-cj.jp/en/news/>; <https://coda-cj.jp/en/activity/international/>); cumulative takedown-request figures presented to the Government of Japan in March 2026 (<https://www.cas.go.jp/jp/seisakukaigi/titeki2/creativewg/dai1/shiryo5.pdf>).

Sustainable Development of the Anime Industry: Association of Japanese Animations, materials concerning the 3 April 2026 symposium, "Symposium toward the Sustainable Development of Japan's Anime Industry—A Growth Strategy Driven by the Twin Pillars of Human-Resource Development and Overseas-Market Expansion." The symposium documents explicit industry discussion of sustainable growth, workforce development, overseas expansion, and related policy needs. (<https://aja.gr.jp/info/2761>).

Anime NEXT_100: Anime NEXT_100 / Anime TAIZEN project materials. These materials document AJA's centennial initiative concerning Japanese animation and its forward-looking framing toward the industry's next hundred years. (<https://animedb.jp/animenext100>).

Applicant History: Toei Animation Co., Ltd., corporate history and Annual Securities Report for the 88th fiscal term, filed 19 June 2026 (EDINET code E02458, document S100YEQC). These records support the Applicant's establishment in 1948 and its long-term continuity in animation production. (<https://corp.toei-anim.co.jp/en/company/history.html>) (<https://corp.toei-anim.co.jp/ja/ir/library/securities.html>).

*All sources were accessed and archived by the Applicant in July-August 2026.