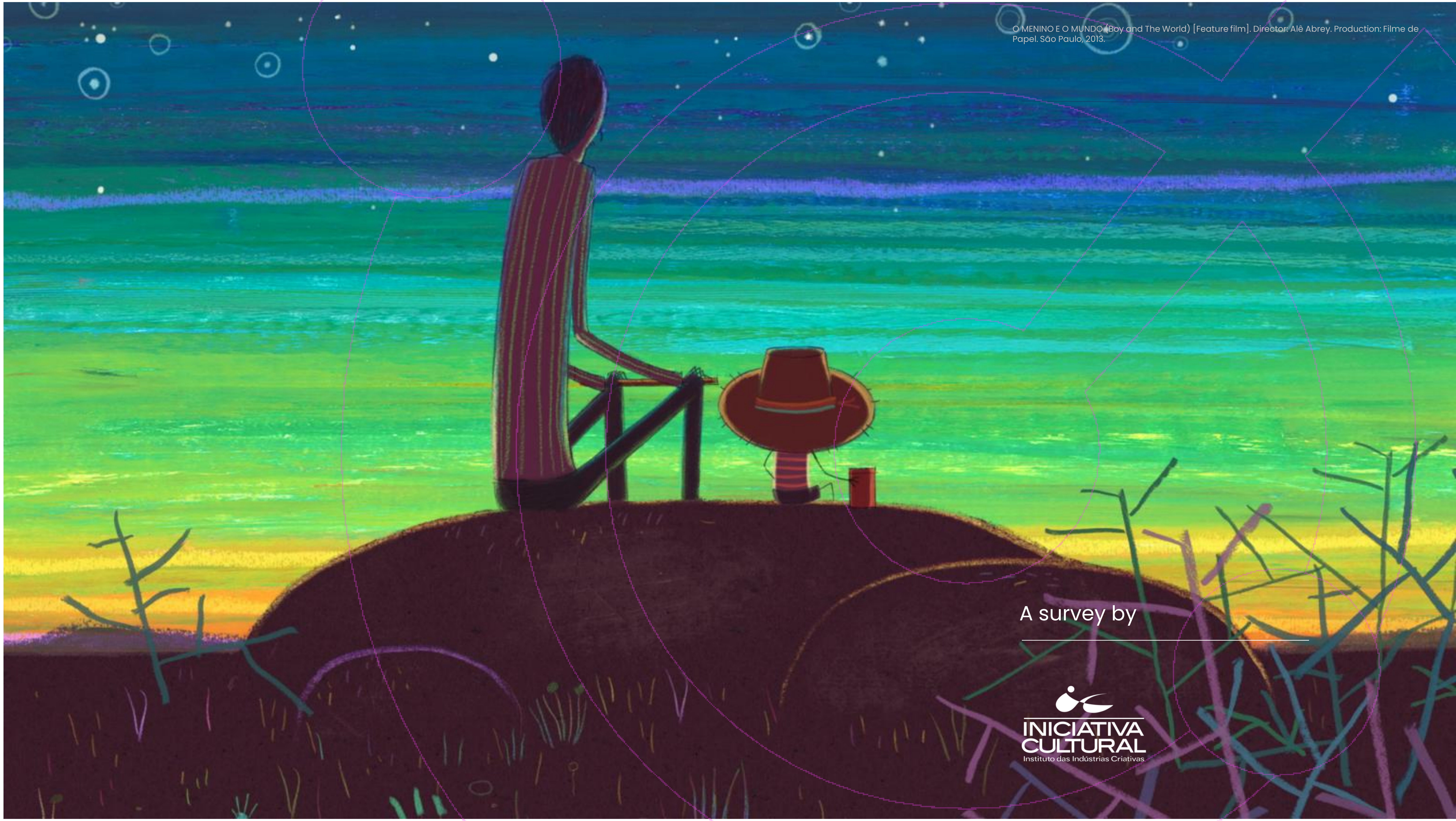
2nd Mapping of ANIMATION IN BRAZIL



O MENINO E O MUNDO (Boy and The World) [Feature film]. Director: Alê Abrey. Production: Filme de Papel. São Paulo, 2013.

A survey by

INICIATIVA CULTURAL
Instituto das Indústrias Criativas

2nd Mapping of ANIMATION IN BRAZIL

Support

Accomplished by

Institutional and International Articulation

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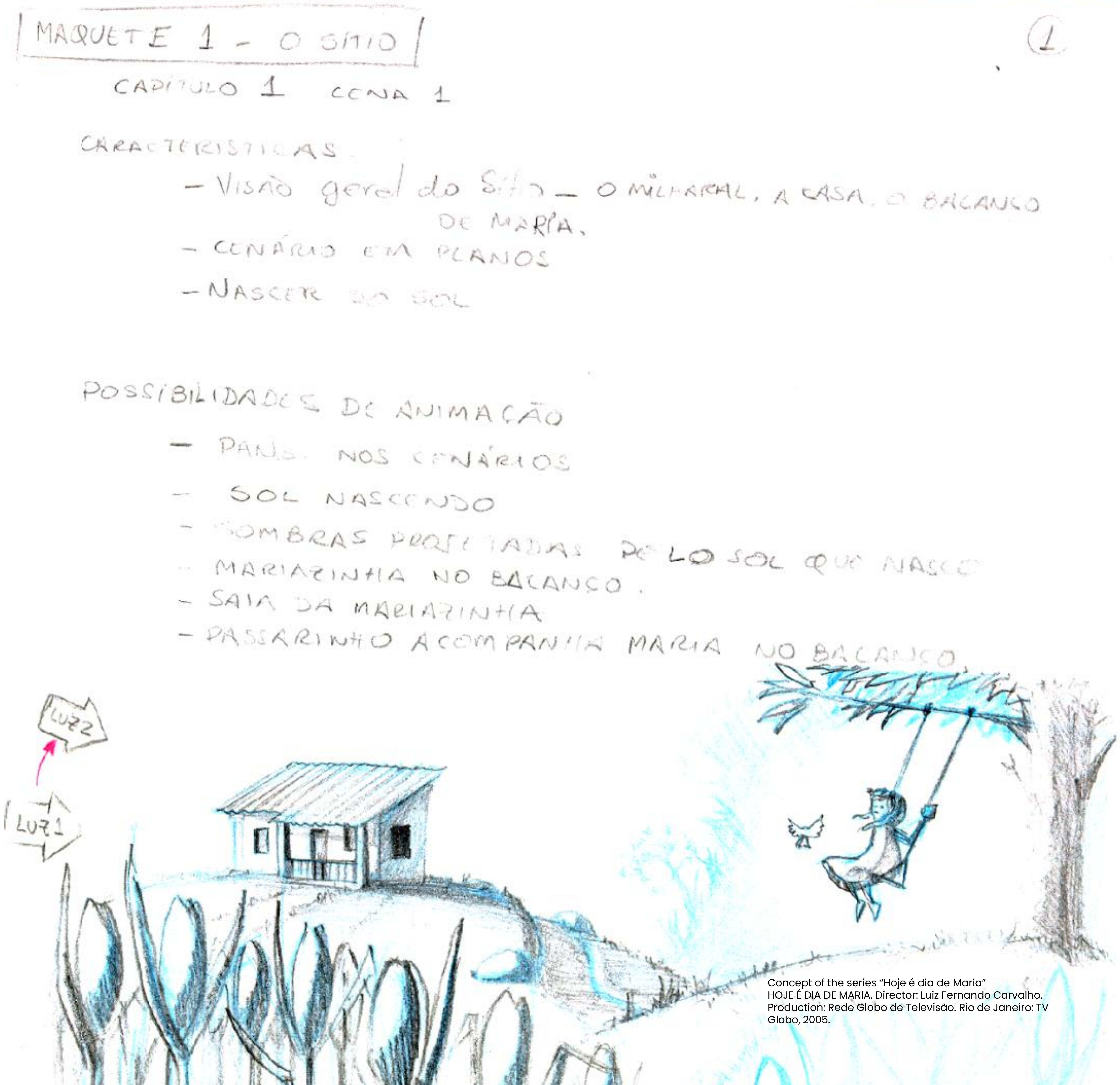
LUPI & BADUKI [Series]. Director: Anderson Lister. Production: Flamma Films. São Paulo: Discovery Kids, 2024-.

Summary

Summary

1 INTRODUCTION



Concept of the series "Hoje é dia de Maria"
HOJE É DIA DE MARIA. Director: Luiz Fernando Carvalho. Production: Rede Globo de Televisão. Rio de Janeiro: TV Globo, 2005.

Mapping Brazil's Animation: Why is it relevant?

The Second Mapping of Animation in Brazil – a result of our biggest effort to "check the pulse" of Brazilian animation – was developed from August/2024 to October/2025, and had as its biggest goal to introduce an updated overview of the sector, identifying its perspectives, hindrances and development opportunities.

The research updated its first edition, from 2019, divulged through an interactive website, which gathered fundamental information about the evolution of techniques, services, processes and infrastructure in Brazil's animation, as well as data about Brazilian animation's introduction in the national and international markets.

That edition involved three steps: an online survey with freelancer companies and individual authors; a focus group with workers in the sector and interviews with specialists and representatives in the production pipeline, such as distributors, financers, education institutions, festival directors and public managers.

In numbers, the second edition of the Mapping of Animation in Brazil comprehends 466 respondents, including:

Production companies
(companies responsible for managing projects and making them feasible);

Studios
(focused on the technical-artistic execution of animated content, such as movies, series and other audiovisual formats);

Freelancers
(workers who perform in the technical-artistic/creative sector of animation, working through outsourced demand);

Animation makers
makers (artists/authors who don't have animation as their main source of income, developing independent animation projects).

The survey was conducted through a structured and updated online form, comprehending strategic themes such as the profile and characteristics of Brazilian animation, the operational dynamics/modes of production (national coproduction, international coproduction, services imports, outsourcing, release platforms and commercialization), as well as the usage of Visual Production and issues regarding Artificial Intelligence usage in animation (knowledge, usage and perspectives), human capital in companies, finances, entrepreneurial management and governance.

Mapping Brazil's Animation: Why is it relevant?

We are witnesses and agents of growth in Brazilian animation, of its production and its transformation into formal careers. Our country has produced many public and critic-acclaimed animations — whose characters have molded generations, nationally and internationally —, showing notable growth as well as significant potential for expansion, consolidating itself as a relevant force in the creative global industry.

We are talking about a segment present throughout the country, and everything it means regarding diversity and structural inequality. The sector encompasses a vast ecosystem of professionals and companies, which dedicate themselves not only in feature films and series, but also in advertisement, motion graphics/motion design, title sequences and institutional videos, video games, technical-scientific-educational animation as well as events, interactive animation (virtual, augmented and mixed reality), apps etc.

As we know, it is not easy to depict such a dynamic, multifaceted and complex sector such as Brazilian animation. However, the effort in organizing data and situational information, in conjunction with context-based analysis – which we have now made publicly available – seems, to us, fundamental in aiding the animation sector to reflect on its own structure, guiding strategic decision-making, funding public policies, and strengthening the presence of Brazilian animation in the global scene.

This initiative was made possible at the hand of the Ministry of Culture, through Lei Paulo Gustavo, via SpCine/Secretaria da Cultura da Cidade de São Paulo, and a vast network of Institutional Supporters.

To all, our greatest gratitude!

Alessandra Meleiro

2 METHODOLOGY

IRMÃO DO JOREL (Jorel's Brother) [Series]. Director: Juliano Enrico: Copa Studio. Rio de Janeiro: Cartoon Network, 2014–2019.

Sampling the animation sector

When sampling small sectors with little to no information, as it happens with animation in Brazil, it is important to focus on direct strategies and using secondary data sources, or quality-based sources, looking for information in sector reports, professional associations' databases and consulting some sector players directly.

Why are these sectors a challenge?

Data scarcity
The lack of aggregate data hinders a quantitative analysis.

Small numbers of participants
With fewer companies, the results of a small sample could be limited.

Internal diversity
Even in a small sector, there might be a big variation in each business, making generalization difficult.

Steps taken to sample this kind of sector:

1. Clear definition of objectives

Making clear what is actually important to investigate: mapping the segments' main characteristics.

2. Evaluating previous knowledge on the sector

This study updates and converses with the **First Mapping of Animation in Brazil,** made in 2019.
Associations and entities of the segment were consulted to provide information about acting profiles on the sector, as well as about which content should be addressed.

3. Sampling strategies

Intentional sampling
Selection of companies known and/or presented in debates about the sector.

"Snowball" sampling
Participants appoint other companies or specialists in the sector.

Sampling the animation sector

4. Collecting data

Online research
Usage of online-platform surveys, to be self-fulfilled. If it were necessary, respondents could interrupt the process, returning to complete the information afterwards.

Divulging the research
The study was broadly divulged on social media, by Instituto Iniciativa Cultural and many other partners, who were also invited to participate and share the survey on their social media accounts. In the process, representative entities of the sector took on a fundamental role, actively working on data collection, contributing to the ample dissemination of the survey.
As a result, we reached 466 answers, an expressive number which shows the strength in the established collaborative network.

We must highlight the institutional articulation of **ABRANIMA**, as well as the institutional support of **ABCA, ABRACI, ANIMATIBA, APACI, API, BRAVI, CONNE, Faculdade Méliès, GAMA, + Mulheres, SANTACINE, SIAPAR, SIAVRS, SINAES** and **SINDAV.**

5. Analysis

Segmentation
Whether we consider the collection or the analysis point of view, the research operates with the following segments: production companies, studios, solo contractors and animation makers. Analyzing such a public as a cluster, in all of their peculiarities, is a way to synthesize what is the Brazilian animation sector nowadays. There are specific questions directed to each of them, duly identified when the data is presented.

Generalization
Considering the characteristics of this kind of sampling, the coherence between 2025 data, when vis-a-vis with 2019 data, shows highly consistent results. The sector participated actively in the study, but we must always be careful with generalization and inferences.

Methodology

Target population

Companies and professionals in the animation industry in Brazil.

Total sampled

During data collection, the main control variables were closely observed.

466 (2025)

455 (2019)

Respondents

People responsible for animation companies (of different sizes) and solo contractors in different stages of formalization.
In some cases, more Than one person may have participated in the process.

Approach

The research was carried out through a structured questionnaire, and entities in the sector helped guaranteeing its ample dissemination.
Publicity strategies included usage of institutional mailing lists, social media and contacting via WhatsApp. To make sure the process would be successful, Instituto Iniciativa Cultural also established communication channels and made technical support available to all respondents.

Online platform

The questionnaire were programmed and made available in an online platform. Participants were able to access it many times to complete the process. The platform stayed open — and the data, collected — between 04/30/2025 and 06/15/2025.

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Questionnaire

The questionnaire was structured according to the following topics: Profiles; Production; Operations; Human Capital; Finances and Management

Profile and Calibration – Stratified by Formalization, Revenue Size and Role in the Animation Industry Pipeline

One of the main stratifications used in the 2019 study was the division between groups of companies and solo contractors (freelancers). In 2025, these subgroups were improved in question P3, detailing how their work in the sector was formalized, presenting two alternatives for “Freelancer” and making the remaining business categories more specific.

Upon first analysis, we observed that the group who considered themselves “MEI” do present the characteristics of “solo contractors/freelancers”, which shows these two waves are indeed coherent, profile-wise. That way, data was calibrated considering the “Solo contractors” and “Companies” stratifications (P3), as well as the size of the companies, considering their reported revenue of 2024.

Mapping 2019

P9.	NA	%
Free/solo contractor	**174**	**61%**
Author/creator	**102**	
Subtotal	**276**	
I manage or represent an institution/ company	179	39%
Subtotal		179
TOTAL	**455**	**100**

Mapping 2025

P3.	NA	%
Free/legal entity	124	64%
Free/natural person	73	
MEI	**104**	
Subtotal	301	
ME	113	36%
EPP	30	
MEDIUM ENTERPRISES	14	
ORG.	8	
Subtotal		165
TOTAL	**466**	**100**

Mapping 2025 – Adjusted

Free/ legal entity	181	61%
Free/natural person	101	
Subtotal	282	
MEI	61	39%
ME	80	
EPP	26	
MEDIUM ENTERPRISES	12	
ORG.	5	
Subtotal		184
TOTAL	**466**	**100**

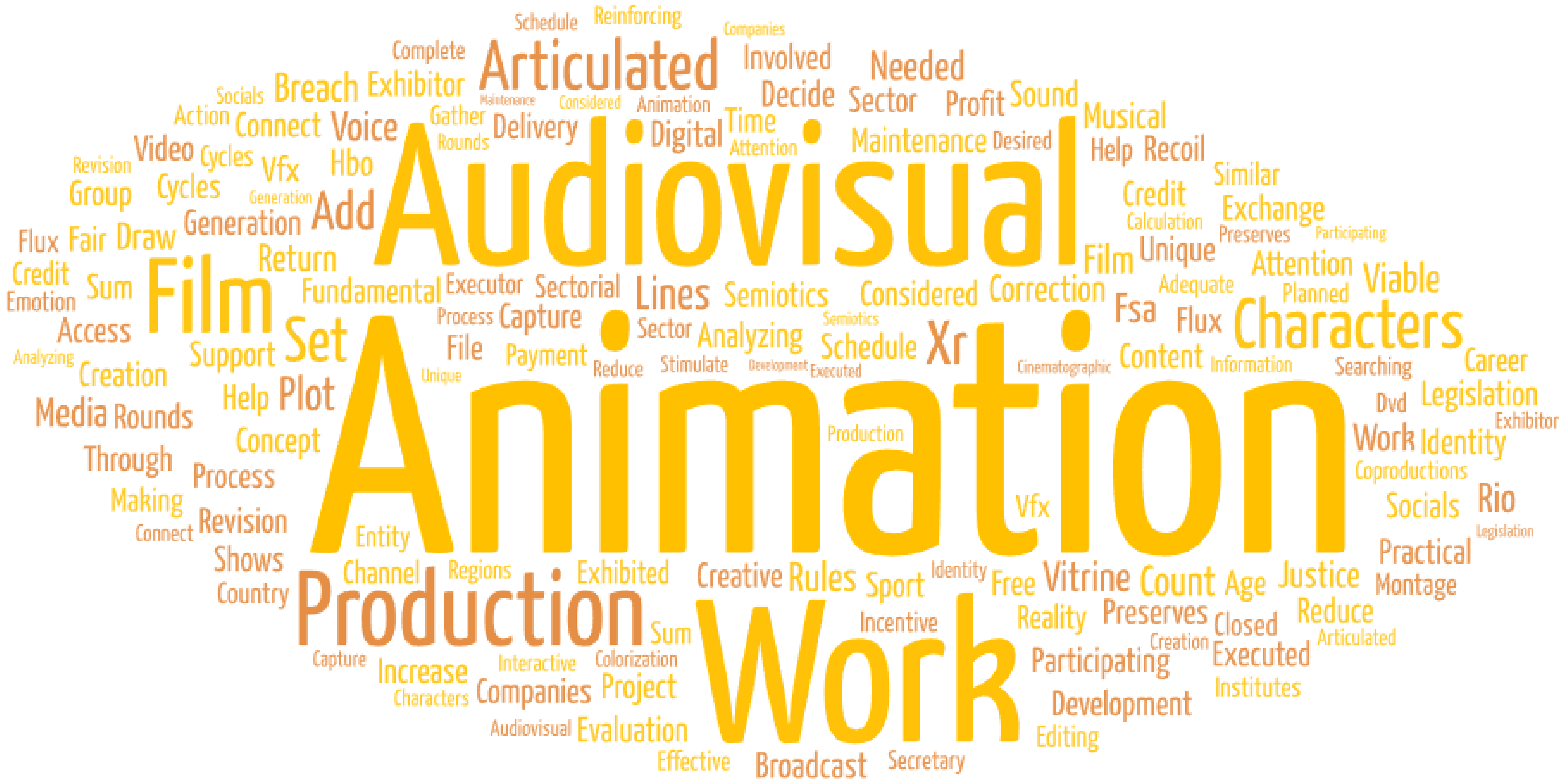
3 GLOSSARY

DIÁRIO DE PILAR (Pilar’s Diary) [Series]. Director: Bruno Bask: Mono Animation. São Paulo: Nat Geo Kids, 2020.

Glossary

We have elaborated a terminology instrument, a glossary, with entries related to Brazil’s animation industry and to this Mapping, as a way to organize knowledge and contribute to a standardized usage and development in this field of study.

[Access the Glossary here.]



4

EXECUTIVE SUMMARY AND RECOMMENDATIONS

4. Executive Summary and Recommendations AFINAL, O QUE QUEREM AS MULHERES? [TV Series]. Director: Luiz Fernando de Carvalho. Production: Rede Globo de Televisão. Rio de Janeiro: TV Globo, 2010.

Executive Summary and Recommendations

The global animation industry was valued at around US$371,21 billion in 2023, and it is predicted to rise to approximately US$580,82 billion in 2032, at an estimated annual growth rate of 5,1% between 2024 and 2032 (ZION MARKET RESEARCH, 2024).

Data analysis shows that the Brazilian animation industry is expanding, but it faces considerable challenges to align itself to the global growth rate of 5,1% per year.
Based on the market challenges shown in the results of this Mapping, we have listed a few considerations:

GROWTH IN THE SECTOR

The sector is mostly composed of small companies and freelancers, who face challenges in profit and growth. Scalability strategies and access to new markets (national and international) may be fundamental, such as:

- Strengthening regional networks and local trade fairs as to bring diversity into distribution channels;

- Developing regional hubs: Establishing creative hubs outside of the Southeast region, decentralizing market opportunities;

- Marketing investments, to encourage animation services' demand and export programs, with government support, to aid small companies into reaching global markets.

Companies who invest in expanding their intellectual property tend to have better perspectives of growth. Coproductions and collaboration-promoting strategies may help smaller companies into expanding their portfolios.

Expansion and growth perspectives: The general prediction is "conservative", with challenges related to branching out sources of revenue and adapting to new industry demands, particularly in smaller businesses.

ZION MARKET RESEARCH. Animation Industry Perspective.
Zion Market Research, 2024. Available at: https:// www.zionmarketresearch.com /report/animation market. Accessed on 10/20/2025.

Executive Summary and Recommendations

GEOGRAPHICAL EXPANSION

Nationalizing production
Encouraging regional policies, creating incentives in the North and Northeast's creative industry scene, so as to attract new talents and local investments. Development and education policies in less-developed areas may help balancing growth and competition in the sector, on a national level.

Creating technological hubs
Investments in infrastructure and qualifications to create animation hubs outside of the Rio-São Paulo circuit.

Regional tax incentives
Developing tax incentive programs for companies who decide to settle in less-explored areas.

STREAMLINIG BUREAUCRACY AND FUNDING

Considering this item shows up as a limiting factor, the obstacle-mitigation strategies and business environment improvements would include:

- Creating a simplified ecosystem for grant applications, with transparency and technical support for small companies;

- Streamlining funding processes;

- Improving access to grants and making accountability more flexible could reduce obstacles cited by small companies;

- Promoting mentorship programs about fundraising (venture capital, public grants).

SCALE OF OPERATION

The animation sector in Brazil is mostly comprised of small companies and freelancers; 17% of those companies (in the last 3 years, on average) are located in an intermediate tier, between R$120.001-360.000.
Only 5% of freelancers achieve profit between R$120.001-360.000, reflecting their limitations in individual scalability. Compared to mature markets such as the US and Japan, in which independent studios often reach over US$1 million in annual profit, Brazil still struggles with structural challenges, such as the access to funding.

The sector's sustainability still depends on public funding and sponsorships, although there are signs of change through the provision of services and direct commerce. The search for market resources, both locally and internationally, must be encouraged, to increase resilience in scenarios with less government incentives.

In order to support small companies into growing healthily, it would be demanded that:

- Incentives and access to subsidized credit programs could increase the number of companies who profit more than R$360.000 a year;

- Professional demand could be supplied through professional qualification development.

BRANCHING OUT REVENUE SOURCES

Should be done by exploring the videogames segment, exploring its growth, which globally profited US$184 billion in 2023.

INTERNATIONALIZATION

As far as the capacity for global cooperation is concerned, data shows that Brazilian animation companies are inserting themselves in the international market; 46% of them export content or services, and 40% carry out international coproductions. Considering participation is more expressive in bigger companies, with bigger profit, international expansion requires the private sector to create policies and strategies which can aid the insertion of small companies in the global market.

We cite a few examples:

- Investing in “glocal” adaptations to different markets – with subtitles and multilingual dubbing – making those productions more globally accessible;

- Amplifying the presence of Brazilian independent studios and producers in strategic international events (by amplifying networking, partnerships, benchmarking), such as Annecy Festival, MIPCOM, Kidscreen etc., through incentive policies, such as promoting collective packs to Brazilian production companies in international events;

- Creating funding programs for small producers, amplifying the export of Brazilian productions to other markets, such as Latin America, Europe and, mostly, Asia, focusing on events and global trade fairs (considering a big percentage of larger companies already act internationally, amplifying it might be a viable strategy to propel the sector);

- Seeking collaborations with international studios to codevelop projects, which could help mitigating financial risk and make new sources of profit a possibility.

ARTIFICIAL INTELIGENCE

It is known that investing in AI, automation and new production trends – when paired together with professional qualification – can optimize processes, reduce operational costs and increase competition in the international scene. However, reaching the economic potential of creative products/services demands better understanding of industries all the more globalized, as well as innovative policies and approaches to face the challenges posed by digitalization and artificial intelligence usage. Public administrators must follow new technology developments and reevaluate regulations and public policies, as a way to make the most of opportunities in creative products/services.

Some of the biggest priorities regarding public policies are the protection of jobs, as well as reinforcing intellectual property, more specifically, copyright laws, adapting and updating regulations and guidelines related to competition and consumer's protection.

MEDIA CONVERGENCE

The process of digital convergence is evident. As streaming platforms and social media grow, companies must make their digital presence (and its strengthening) a priority. However, it is essential to adopt a hybrid approach, keeping traditional channels (broadcast/pay TV, festivals etc.) in mind, as they are still relevant.

PARTICIPATING IN NATIONAL INDUSTRY EVENTS

The strategies below are recommended to companies and freelancers as a way to broaden their presence in important events for benchmarking and partnership opportunities:

- Strengthening regional representation: Stimulating local events in regions with low market participation, such as the North and Northeast of Brazil, to decentralize opportunities and strengthen producers outside of Rio and São-Paulo;

- Supporting important national events: Expanding visibility of events such as Rio2C, MAX Minas etc., to attract new players and audiences;

- Investing in qualification to small and independent companies, as a way for them to present competitive projects in events;

- Creating structured networking: Developing platforms to connect event participants after they happen, such as online networks to exchange contact information and opportunities in the industry;

Those strategies, if adopted by the State, the private sector and the third sector, could put Brazil in a competitive position in the global market, using the ever growing demand for animated and interactive content in its favor.

STRATEGIC MANAGEMENT ACTIVITIES

Older companies, bigger in size and financial capacity, have a structured and regular approach to strategic management when compared to younger, smaller companies. It is also observed that export companies regularly carry out strategic management operations, indicating that focusing on international markets encourages advanced strategic practices.

We highlight that the biggest percentage of companies, made out of micro and small institutions – the ones who struggle the most to make analysis a priority, or have never put it to practice altogether – show areas in need of improvement and consistency strengthening, as well as increasing the frequency of strategic planning. These practices can be accomplished through external support, such as training, consulting and encouraging the use of management tools.

TARGET AUDIENCE AND CONSUMPTION

Brazil is well-aligned with global trends when it comes to genres, as comedy and adventure lead the popularity ranking. The adult target audience in Brazil is above the international average, pointing towards investment opportunities in animated series and other contents targeted to adults.

Science fiction, horror and suspense are produced in Brazil in low numbers; that suggests an uncharted territory for diverse productions that could attend both local and international audiences.

5 RESULTS

O MENINO E O MUNDO (Boy and The World) [Feature film]. Director: Alê Abrey. Production: Filme de Papel. São Paulo, 2013.

5.1 The Profile of Animation in Brazil

Scope of action

Main activity

Intersection with correlated areas

Role in the animation pipeline

Características descritivas

Legal formalization

Years in Operation in Animation

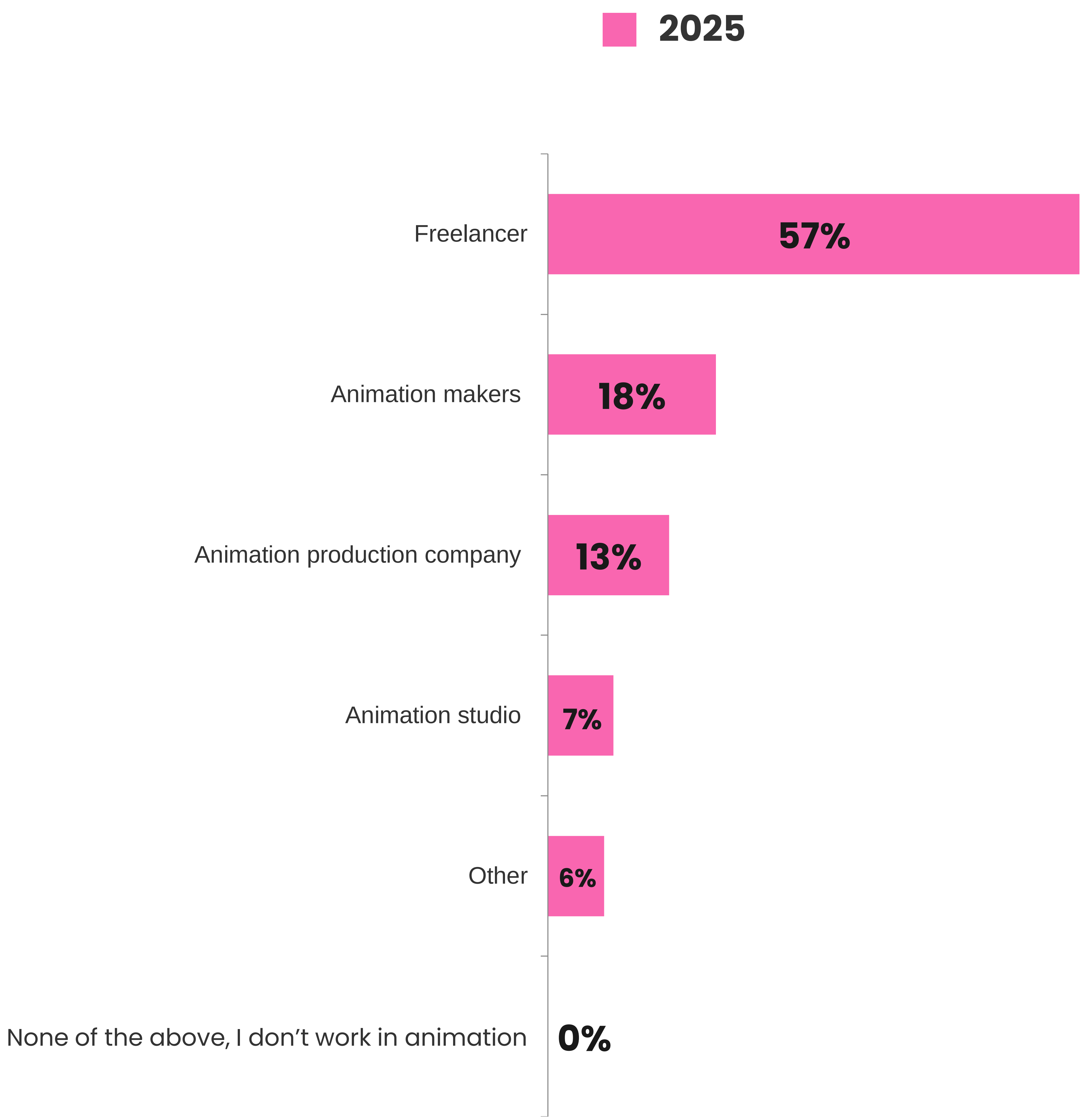
Region

Scope of Action
Total of Respondents

MAIN ACTIVITIES AND GENERAL FILTER FOR PARTICIPATION

Most respondents (57%) identify themselves as freelancers – indicating great predominance of independent professionals – and 18% work as animation makers (artists/authors who do not have animation as their main source of income, developing original animation projects).

We also have 13% of respondents categorized as production companies, and 7% as animation studios.

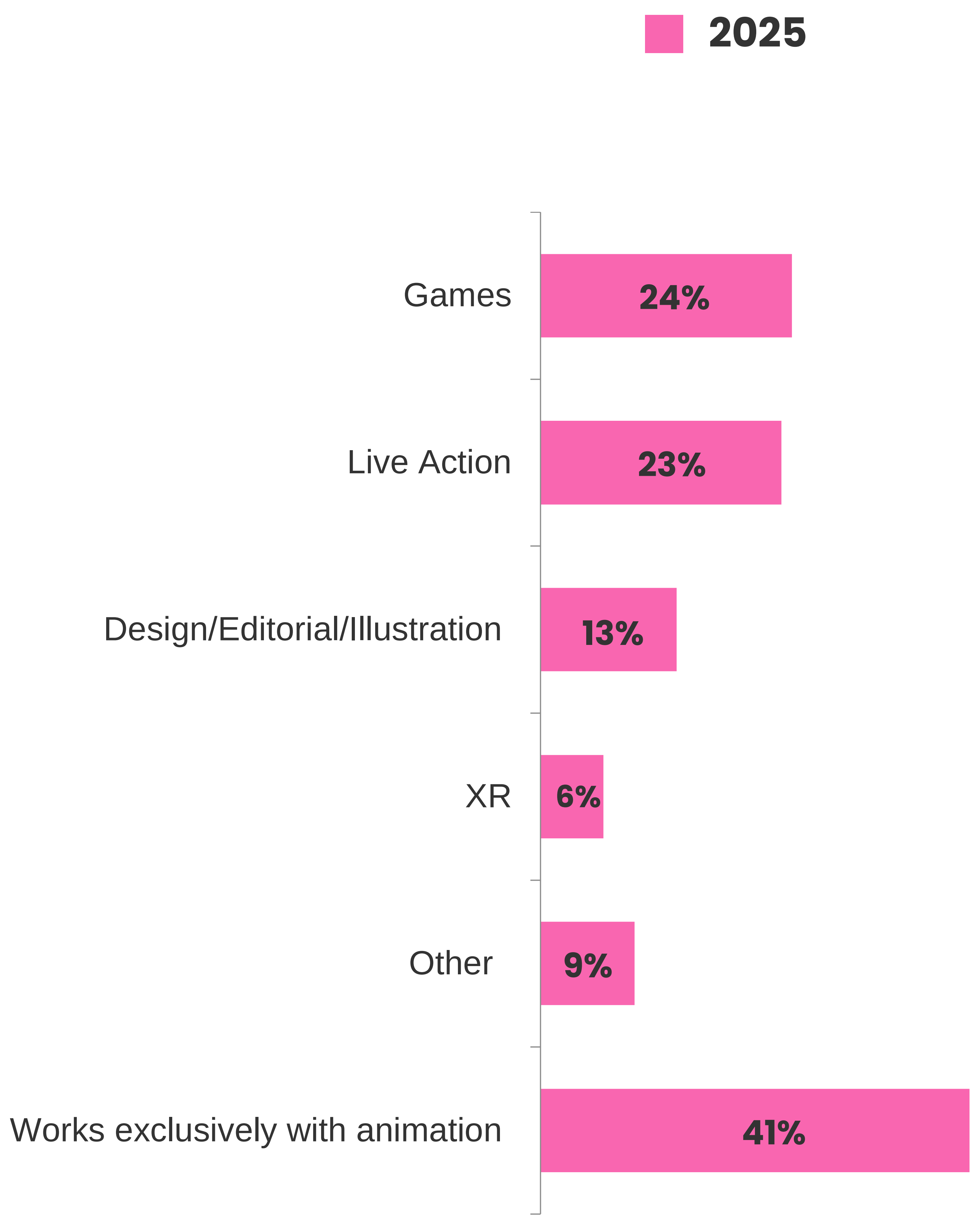


Basis: total of respondents (2025: 466). Results presented in %.
Source: P1. This survey is destined to production companies, studios, solo contractors and animation makers in the sector. Select the option which best describes your main activity. (Single-answer | Prompted options)

Scope of Action
Total of Respondents

INTERSECTION WITH CORRELATED AREAS

Considering the intersection with other areas in audiovisual production, we highlight the relevance of the videogame segment, which follows suit to the global movement of industry growth. Its profit projection for 2025 is US$188,8 billion, 3,4% higher than last year (LAURENCE, 2025).



LAURENCE, Felipe. Mercado global de jogos eletrônicos deve ter um crescimento de 3,4% no faturamento em 2025. (Global market of eletronic games must grow 3,4% in profit in 2025). Valor Econômico: São Paulo, 09/17/2025.

Basis: total of respondents (2025 : 466). Results presented in %.
Source: P2. Apart from working in animation, do you also work in other sectors/segments in the market? Choose all that apply. (Multiple-answer | Prompted options)

Scope of Action

Role in the animation pipeline

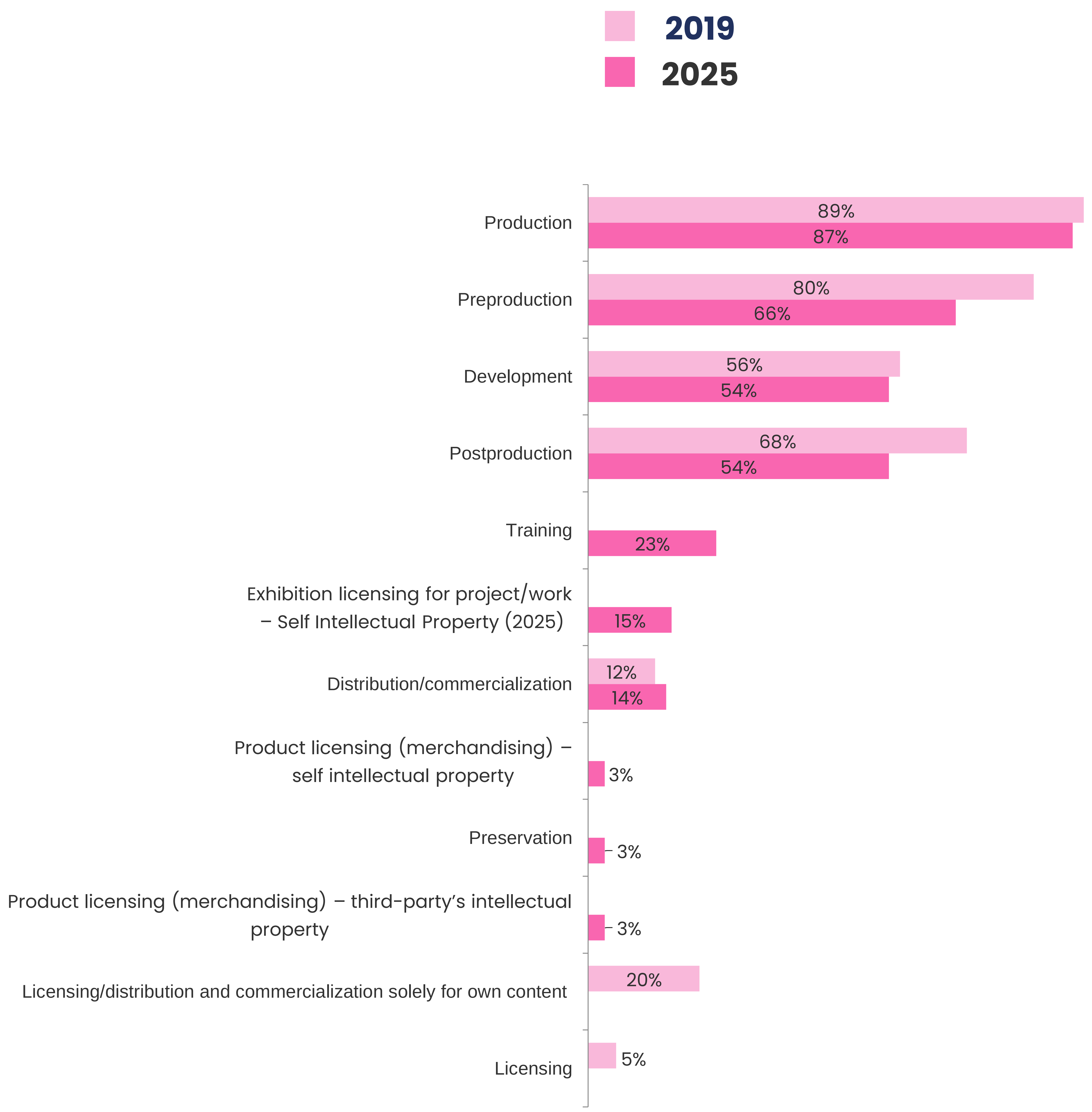
Total of Respondents

Most respondents are concentrated, participating concomitantly in the four main steps of animation's pipeline. In 2025, 66% stated participation in "Preproduction"; 87% in "Production"; 54% in "Development" and the same percentage works in "Postproduction".

Just the same as 2019, 2025 has low participation in "Distribution/commercialization": 14% of the segment. Such percentage reveals the need to strengthen the distribution and circulation channels of Brazilian works, considering different formats and profiles.

In the second edition, we introduced two new steps to be analyzed: "Training", which represents 23% of respondents, and "Preservation", at just 3%.

Another upgrade in 2025 was the detailing of licensing types, the most common among them being "Exhibition licensing for project/work – Self Intellectual Property" (15%).



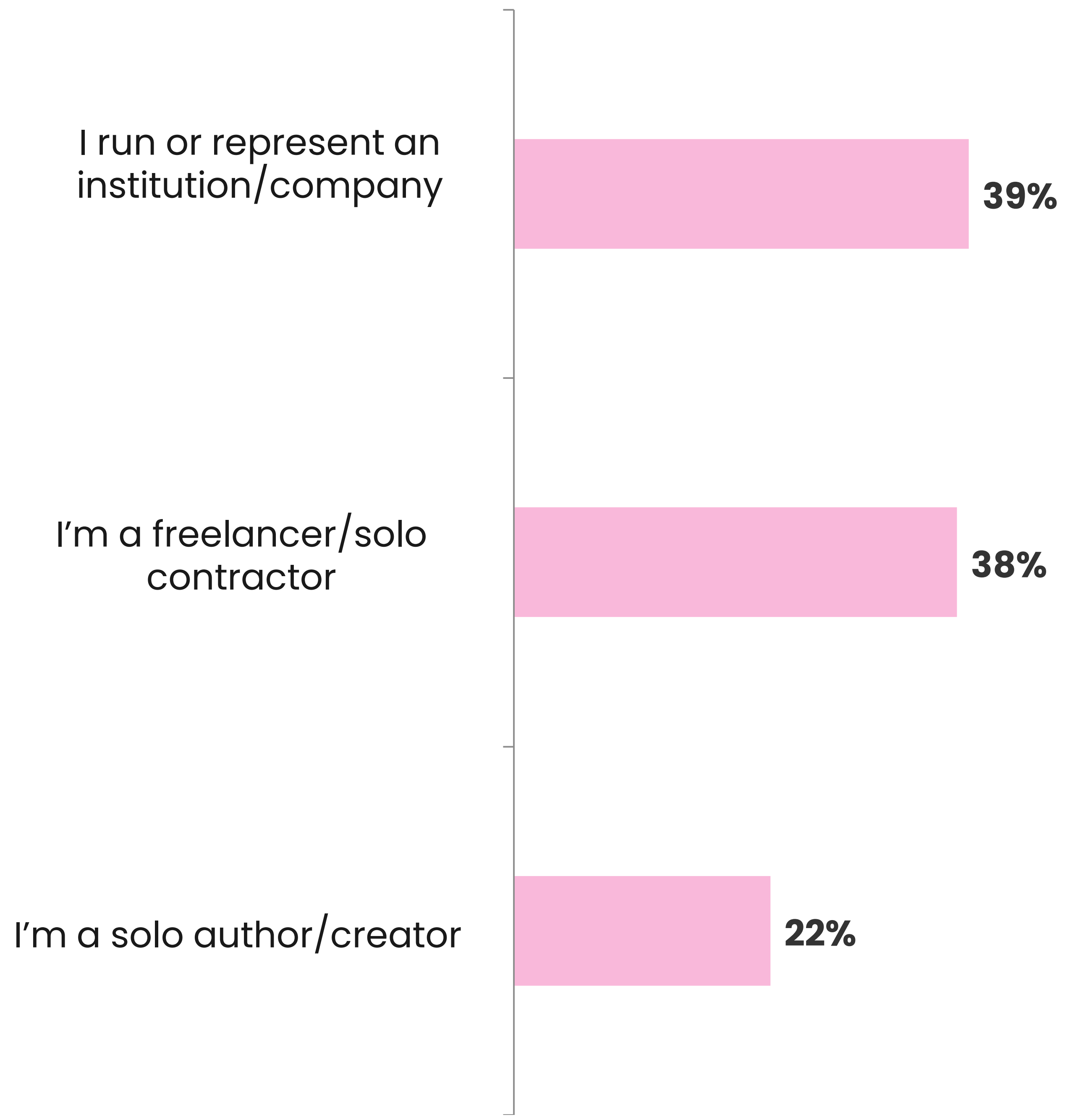
Basis: total of respondents (2019: 455 | 2025: 391). Results presented in %.
Source: P11. In which step(s) of the animation production chain your company/institution/you work? (Multiple-answer, all that apply in both waves | Prompted options). Alternatives were prompted with different options on each wave.

Legal formalization
Total of respondents

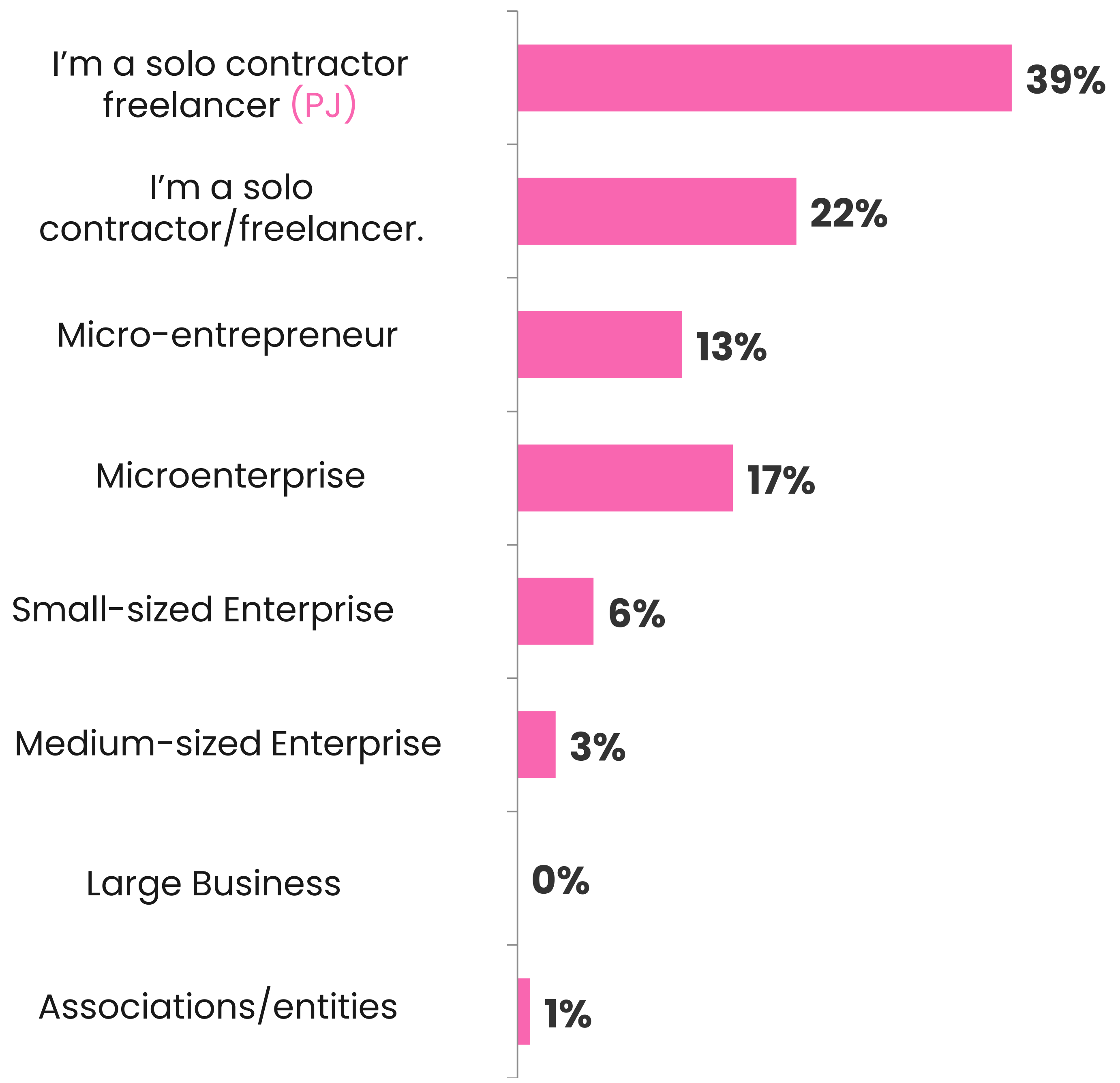
61% of freelancers work by themselves or in small structures (30% operate as MEI and ME), while bigger companies (Medium and Small enterprises) present 9% of the universe presented. Data is nearly unaltered between 2019 and 2025. The sector is still mostly comprised of small businesses, and it reflects an ecosystem dominated by small and micro companies.

2019
2025

2019



2025



PJ stands for "Pessoa Jurídica", a person who represents their own company. In English, "Legal Entity".

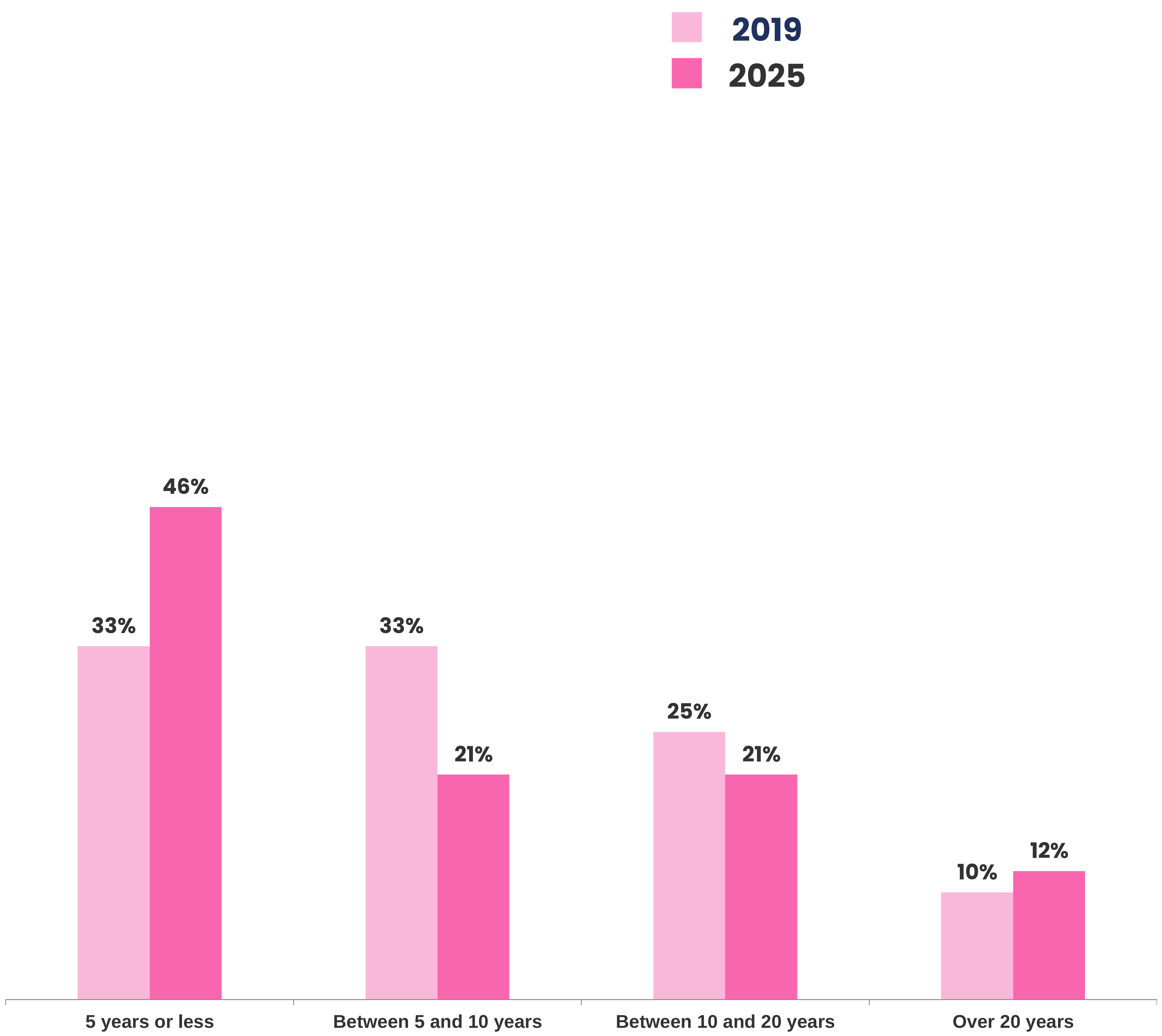
Basis: total of respondents (2019: 455). Results in %
Source: P9. Select the option with which you identify the most:
(Single-answer | Prompted options)

Basis: total of respondents (2025: 466). Results in %.
Source: P3. Select the option which identifies you the most:
(Single-answer | Prompted options)

Years in operation
Total of respondents

The ratio of long-lasting companies (10 years or more) mostly hasn't changed between 2019 and 2025. However, there's been considerable growth in the number of companies created in the last five years, reaching 46%, contrasting with companies older than 10 years, at 33%.

The biggest shift in that regard is the percentual reduction of 5-10 year-old companies, leaving space for 5-year-old or younger companies to grow in percentage.
That indicates a relatively young market, in which a lot of companies start and new players can enter.



Basis: total of respondentes (2019: 451 | 2025: 399). Results in %.
Source: P10. In what year was you company/institution founded?
(Single-answer | Unprompted response)

Years in operation
Total of respondents

The importance of regulation is indisputable to many branches of economy. The animation sector is no different: here, we highlight the legal framework which has made public policies possible and structured, as well as the creation of new independent companies in the last 32 years.

Law 8.685/1993
Audiovisual's Law
Fiscal incentives for companies who fit in the Actual Profit Method and distributors of foreign works to invest in independent, national productions, in a coproduction model.

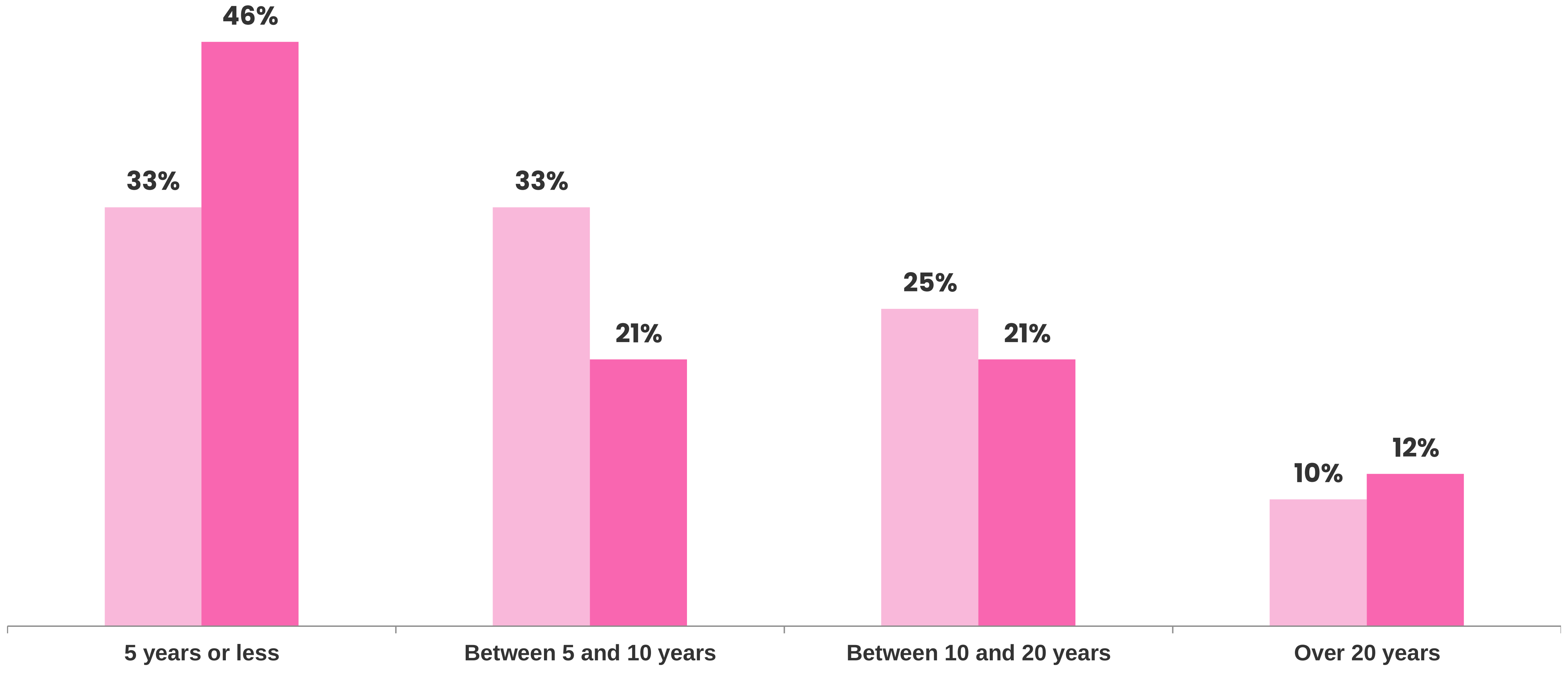
Provisional Measure 2.228/2001
Created Ancine and Condecine-Título, as well as fiscal incentives for pay television channels to provide resources in independent, national productions, in a coproduction model.

Law 11.437/2006
Created the Audiovisual Sector Fund (FSA), where resources from Condecine could be channeled, as well as fiscal incentives for broadcast TV channels to coproduce with independent producers.

Actual Profit Method is a Brazilian tax system, determined by subtracting the revenue earned during the fiscal year by the costs and expenses qualified for legal deduction. It is mandatory for companies with revenue exceeding R$78 million a year.

Law 12.485/2011
"Pay TV" Law
Determined there should be a share of national content in pay television channels, half of which should be independent content. Created Condencine-Teles. It also determined that 30% of those resources must be directed towards the North, Northeast and Central-West regions of the country.

Aldir Blanc's Law and Paulo Gustavo's Law
Emergency federal laws created to support the cultural segment, as a way to diminish the economic impact of COVID-19 (MELEIRO; IVANOV, 2023).



Emergency laws (Paulo Gustavo and Aldir Blanc)

Law 11.437/2006
Law 12.485/2011t

Law 8.685/1993
Provisional Measure 2.228/2001

*MELEIRO, Alessandra. IVANOV, Debora. "Os desafios da regulação do vídeo sob demanda no contexto da web 3.0". (The challenges of video by demand regulation in the context of web 3.0). Revista Observatório Itaú Cultural: São Paulo, 2023.

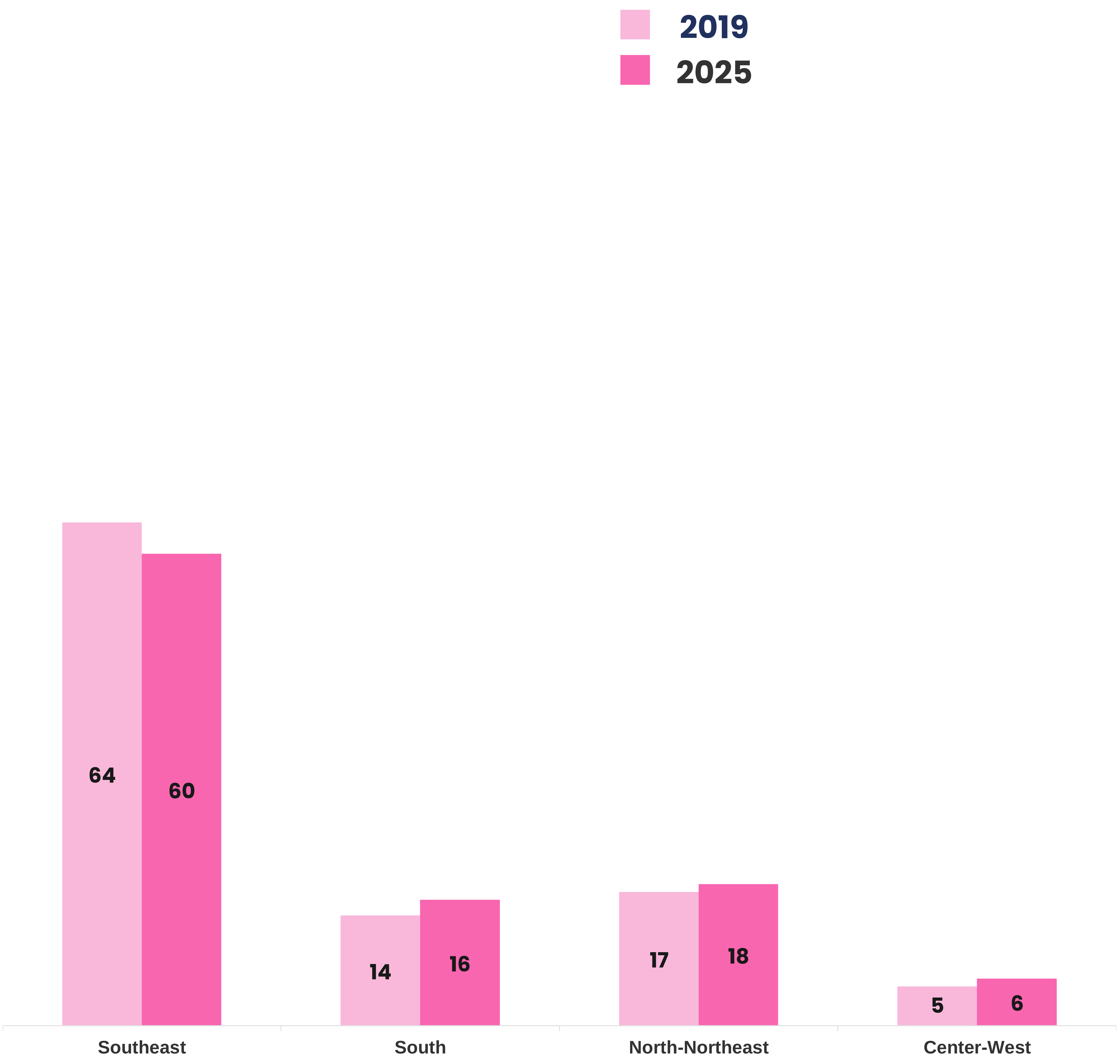
Basis: total of respondents (2019: 451 | 2025: 399). Results in %.
Source: P10. In what year was you company/institution founded? (Single-answer | Unprompted response)

Geographical distribution in the sector

Total of respondents

The geographical distribution in the animation sector is still heavily concentrated on the Southeast region, with smaller representation in the North-Northeast, South and Central-West regions, despite a slight increase in expansion during the 2019-2025 period.

The Southeast continues having more companies/solo contractors than all the other regions in Brazil.



Basis: total of respondents (2019: 451 | 2025: 400). Results in %.
Source: P16. Answer with the state of your company/institution's headquarters. If you are a solo contractor, where do you reside? (Single-answer | Unprompted response)

Participation in representative entities

Total of respondents

As we have been able to observe in the breakdown of participation in different steps of the productive chain, the diversity of participation in correlated areas also reflects itself in the participation of a wide range of representative entities.

The ones with the most mentions are ABCA (19%) and ABRANIMA (14%), followed by BRAVI (8%), an entity not exclusive to animation, and ABRAGAMES (5%), which represents a correlated segment to animation, and with which the intersections are of all the greater interest.

It is worth noting that 58% of the surveyed are not associated with any entities. Considering a sector in which contractors and companies must be involved in many steps during production, it is likely their participation is difficult to decide, evaluating the cost-benefit between the advantages and services that come with association and its disadvantages, such as the need to put in productive hours in the name of the entity.

Basis: total of respondents (2025: 267). Results in %.
Source: P41. Is your company/institution part of any representative entity in the audiovisual sector? Are you part of any? (Multiple-answer, all that apply | Prompted options)

2025

	%
ABCA - Associação Brasileira de Cinema de Animação Animação *(Brazilian Association of Cinema and Animation)*	19%
ABRANIMA - Associação Brasileira de Empresas de Animação Animação (*Brazilian Association of Animation Companies)*	14%
BRAVI - Brasil Audiovisual Independente (Independent Audiovisual Brazil)	8%
ABRAGAMES - Associação Brasileira das Desenvolvedoras de Games (*Brazilian Association of Videogame Developers)*	5%
Fórum dos Festivais *(Festival Forum)*	3%
CONNE - Conexão Audiovisual Centro-Oeste, Norte, Nordeste Nordeste *(Audiovisual Network of Central-West, North, Northeast)*	3%
API - Associação das Produtoras Independentes do Audiovisual Brasileiro (*Independent Production Companies in Brazil's Audiovisual Industry Association)*	3%
SINDAV-MG - Sindicato da Indústria do Audiovisual de Minas Gerais Gerais *(Minas Gerais' Audiovisual Industry United)*	2%
ABRA - Associação Brasileira de Autores Roteiristas *(Brazilian Association of Screenwriters and Authors)*	2%
FAMES - Fórum Audiovisual de MG, ES e dos Estados do Sul do Brasil *(Audiovisual Forum of Minas Gerais, Espírito Santo and the Brazilian South States)*	1%
ABD - Associação Brasileira de Documentaristas *(Brazilian Association of Documentary Makers)*	1%
GAMA - Associação de Games e Animação *(Videogames and Animation Association)*	1%
XRBR - Associação Brasileira de Realidade Estendida *(Brazilian Association of Extended Reality)*	1%
SANTACINE - Sindicato da Indústria Audiovisual de Santa Catarina *(Santa Catarina's Audiovisual Industry United)*	1%
FOCA - Fórum Cearense de Animação *(Ceará's Animation Forum)*	1%
SINDCINE - Sindicato dos Trab Ind Cin Estados de SP, RS, MG, MS, Goiás, TO e DF *(São Paulo, Rio Grande do Sul, Minas Gerais, Mato Grosso do Sul, Goiás, Tocantins and Distrito Federal's Film Industry Workers United)*	1%
COMA - Coletivo Mineiro de Animação *(Minas Gerais' Animation Collective)*	1%
Brazilian Content	1%
SIAPAR - Sindicato da Indústria Audiovisual do Paraná *(Paraná's Audiovisual Industry United)*	1%
ICine - Fórum de Cinema do Interior Paulista *(São Paulo State's Cinema Forum)*	1%
+Mulheres Lideranças do Audiovisual Brasileiro *(+Women in Leadership of Brazilian Audiovisual)*	0%
Cinema Brasil	0%
ABRACI - Associação Brasileira de Cineastas *(Brazilian Filmmakers Association)*	0%
FORCINE - Fórum Brasileiro de Ensino de Cinema e Audiovisual *(Brazilian Forum of Cinema and Audiovisual Education)*	0%
Outros *Others*	5%
Não sou/somos membro(s) de entidade *I am/We are not members of any entities*	58%

5.2 Animation production characteristics

Core business

- Products
- Services

Production aspects

- Genre
- Target audience (by age)
- IP
- Exporting

Types of products
Total of respondents

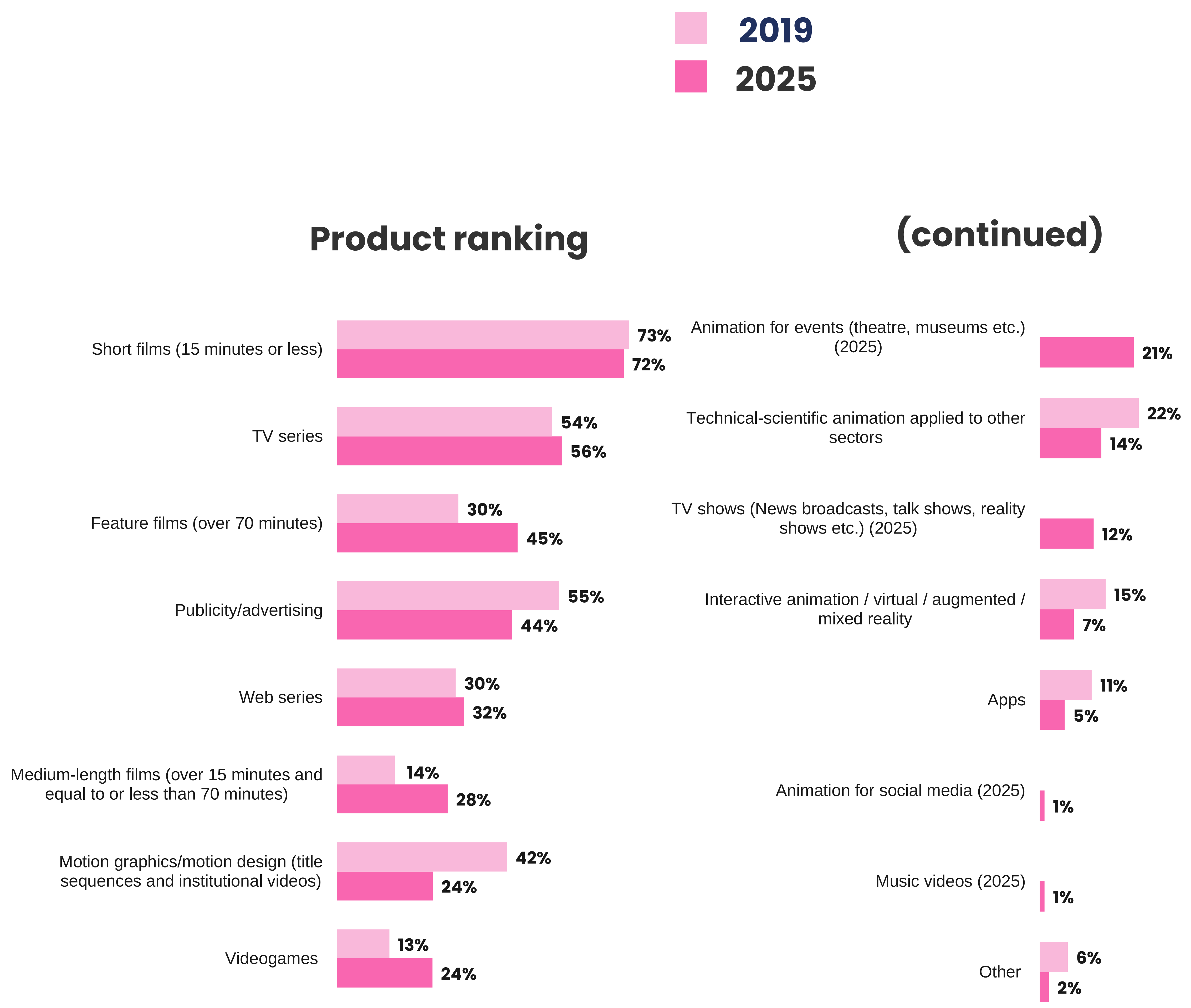
The retraction in the publicity and advertising industries, as well as in motion graphics and motion design, has been followed by an expansion in videogames production.

Regarding the types of products, we can affirm that, in the period between 2019-2025:

1. There hasn't been significant changes in the number of companies working with short movies, TV series and web series;

2. There's been an expressive increase in the number of companies working with videogames, medium-length and feature films;

3. The segments which retracted the most were motion graphics/motion design, interactive animation, apps and technical-scientific animation (possibly due to the lack of funding opportunities in scientific dissemination).



Basis: total of respondents (2019: 453 | 2025: 375). Results in %.
Source: P14. Considering the final product, in what kind of projects/works does your company/institution work? / If you are a freelancer, what products do you usually produce? / Choose all that apply.
(Multiple-answer, all that apply on both waves | Prompted options). Alternatives were prompted with different options on each wave.

Services portfolio
Total of respondents

The production pipeline in animation involves a broad and complex spectrum of services, many of them done by the same freelancer or company.

2019
2025

Service ranking	2019	2025	Variation (over 5 points)
	%	%	
Animation	85	75	↓
Character Design	45	41	
Storyboarding	45	38	↓
Production design (2025)		36	
Set design	31	35	
Animatic	38	35	
Editing [2025]		34	
Illustration services	37	31	↓
Screenwriting (2025)		31	
Production (2025)		30	
Directing (2025)		30	
Visual compositing (2025)		24	
Colorization (2025)		24	
Rigging	22	22	
Motion graphics	39	22	↓
Clean up	31	22	
Executive producing (2025)		21	
Visual effects (2019) Visual effects/VFX (2025)	27	20	↓
BASIS	451	378	

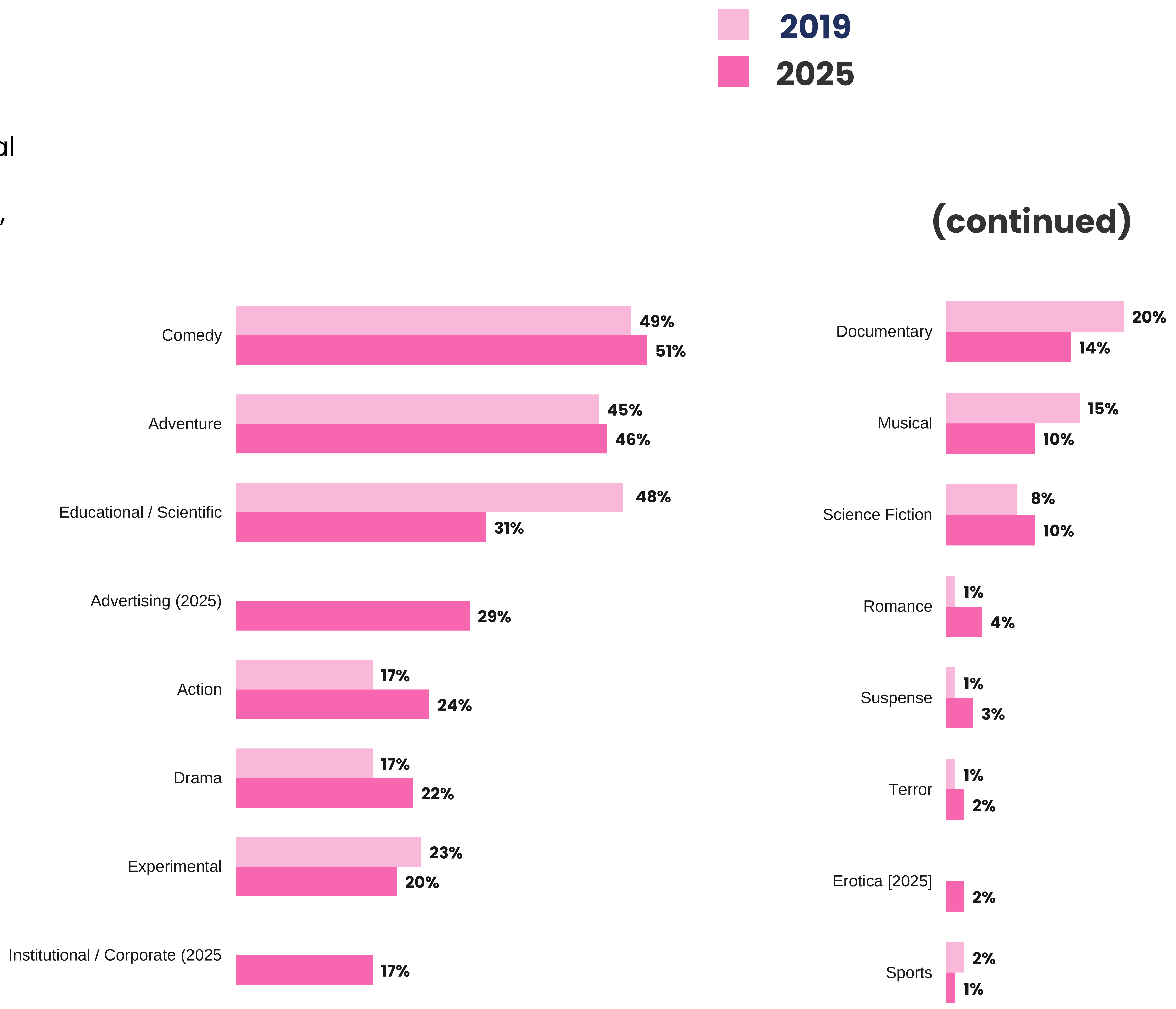
(continued)	2019	2025	Variation (over 5 points)
	%	%	
Creative executive producing (2025)		19	
Modelling	19	15	
Training/qualification (2025)		12	
Mentoring/consulting/advising		10	
Original dubbing (2025)		9	
Musical composition (2025)		7	
Consulting (2025)		7	
Distribution [2025]		7	
Animation sound (recording, SFX, foley)	5	6	
Virtual reality	6	4	
Mixed reality [2025]		3	
Exhibiting [2025]		3	
Augmented reality	5	3	
Motion capture [2025]		2	
Supervision [2025]		1	
We do not outsource services [2025]		1	
Other	15	2	
Project design [2019]	24		
BASIS	451	378	

Basis: total of respondents (2019: 451 | 2025: 378). Results in %.
Source: P13. Which services in the animation production pipeline does your company/institution provide most frequently? If you are a freelancer, which ones do you provide the most?
(Multiple-answer, all that apply on both waves | Prompted options). Alternatives were prompted with different options on each wave. NE = Not evaluated

Produced genres
Total of respondents

Around half of respondent companies claimed to produce comedy and adventure content – an unchanged scenario in the 2019-2025 period – due to the commercial appeal of both genres (as in, broad acceptance from different audiences), which is in alignment with global consumption tendencies.

Genres such as suspense, horror, and science fiction have a smaller participation in Brazil while growing in the global market, indicating unexplored niches in our industry.



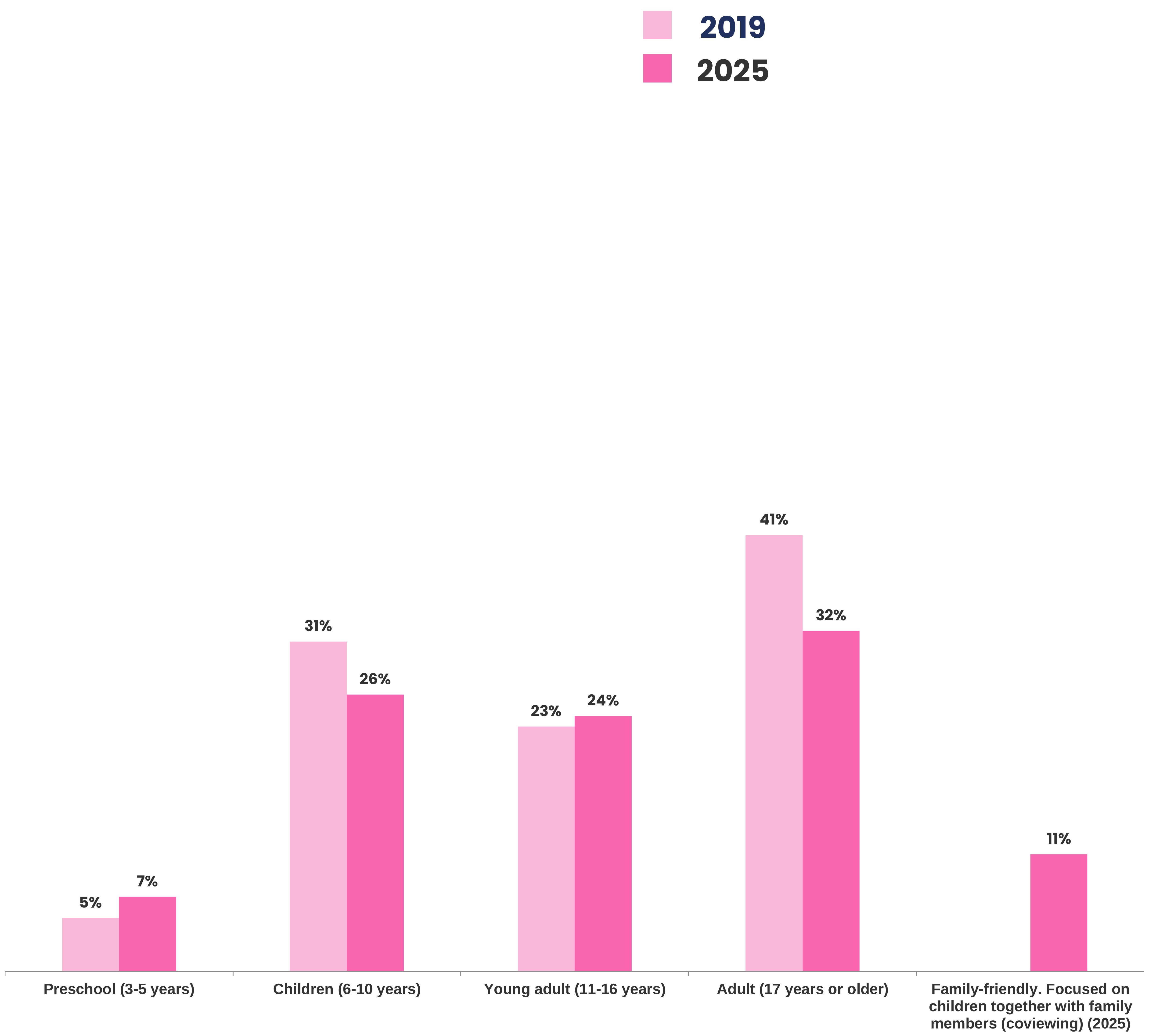
Basis: total of respondents (2019: 454 | 2025: 319). Results in %.
Source: (2019) P20. What are the 3 most produced genres in your company? (Multiple-answer | Multiplicity 3x). (2025) P25. Check the 3 options of projects/works your company/institution does/you do. (Multiple-answer | Prompted options)
.

Target audience, by age group
Total of respondents

Regarding age groups of the productions' target audience, most of the projects/works are divided into children's productions (26%), young adult's (24%) – aligned with the global average – and adult's (32%), indicating that the Brazilian market is diverse.

The importance given to producing animation for adult/family-friendly audiences follows the growing trend on the global market. Brazilian production companies and studios are still not taking advantage of such opportunities.

The preschool segment (7%) is still unexplored, despite its strategic and expansive potential.



Basis: total of respondents (2019: 455 | 2025: 318). Results in %.
Source: (2019) P21. Thinking of the final viewer, which age group is the target audience of your productions? (2025) P26. Thinking of the final viewer, which age group is the target audience of most of the productions/works done by your company/institution? If you are a freelancer, what is the target age group of most of your projects/works in which you work? (Single-answer | Prompted options)

Owned or third-party intellectual property
Total of respondents

Most of respondents (60%) work in projects whose intellectual property is owned by third parties, having no participation in copyright retention for these pieces. As far as profit goes, companies with smaller revenue (up to R$120.000) work mostly (68%) with third-party intellectual property, while the ones with larger revenue (over R$600.000) have a balance between both, with a slight predominance over owned intellectual property.

Established companies, both in years of operation and in size, tend to hold a higher number of intellectual property, indicating that strategies for growth and sustainability are directly associated with an increase and consolidation of portfolio.

.

2025

	TOTAL	2024 Profit (in R$)			
		Up to 120k	From 120k to 600k	Over 600k	Doesn't know
	%	%	%	%	%
Average – projects/works with **owned** intellectual property	**40**	**32**	**45**	**56**	**61**
Average – Projects/works with **third-party** intellectual property	**60**	**68**	**55**	**44**	**39**
TOTAL	**100**	**100**	**100**	**100**	**100**

Basis: total of respondents (2025: 351). Results in %.
Source: P16. Considering your company/institution's full portfolio, what is the percentage of owned intellectual property and third-party intellectual property? If you are a freelancer, consider your professional experience. The percentage sum must be equal to 100%.
(Multiple-answer | Unprompted response)

Export of products and services

Total of respondents

Considering 46% claim exporting owned IP content and/or animation services to other countries in 2025, there's been a 4% increase in global competition between 2019-2025. Although that is a positive number, considering the structural hindrances in the sector, Brazil still needs to deal with the challenge posed by 54% of respondents who do not work in the international market, and demand support to achieve new **opportunities** in the **international** scene.

The export of owned IP is expressively higher in companies with larger revenue (50%) when compared to micro-enterprises (10%), indicating a close relationship between a company's financial capacity and access to the international market.

2019
2025

Has your company/ institution/ have you exported animation content and/or services to other countries?

Yes 42%

No 58%

Basis: total of respondents (2019: 455) (2025: 339). Results in %.
Source: P19. Has your company/institution/have you exported animation content and/or services to other countries?
(Multiple-answer | Prompted options)

Has your company/ institution/ have you exported animation content and/or services to other countries?

Yes 14% (exporting of owned IP content)

Yes 37% (exporting of animation services)

No 54%

Basis: exports IP (46) | exports services (2019: 189) (2025: 127). Results in %. Source: P19_1. Indicate 3 countries to whom your company/institution/you export owned IP animated content the most. P19_2. ... export animation services the most.
(Multiple-answer | Prompted options)

Export of products and services in animation
Total of respondents

The most frequent destinations for content exporting (owned IP) include the United States (45%), Canada (20%), China (20%), France (19%) and Portugal (18%), which highlights a strong Brazilian presence in North American and European markets, as well as China. The Latin American market is also relevant, as countries such as Argentina (19%) and Mexico (14%) are cited as frequent destinations.

■ 2025

	IP (14%)	Services (37%)
	%	%
USA	45	72
Canada	20	25
China	20	5
Argentina	19	5
France	19	13
Portugal	18	7
Spain	16	7
Mexico	14	13
Russia	12	0
Germany	11	2
England	9	5
South Korea	6	-
Chile	6	4
Ireland	5	4
Japan	5	5
United Kingdom	3	5
BASIS	**46**	**127**

Basis: total of respondents (2025: 339). Results in %.
Source: P19. Has your company/institution/have you exported animation content and/or services to other countries?
(Multiple-answer | Prompted options)

Export
Number of cited countries

Other countries mentioned

India
Israel
Latvia
Lithuania
Mozambique
Nigeria
Paraguay
Peru
Poland
Puerto Rico
São Tomé and Príncipe
Switzerland
Turkey
Venezuela
South Africa
Saudi Arabia
Australia
Bolivia
Cape Verde
Colombia
Denmark
Dubai
United Arab Emirates
Slovenia
Estonia
Philippines
Finland
Netherlands
Angola
Italy
Poland
Sweden
Uruguay
Vietnam

Basis: exports IP (46) | exports services (2019: 189) (2025: 127). Results in %.
Source: P19_1. Indicate 3 countries to whom your company/institution/you export owned IP animated content the most.
P19_2. ... export animation services the most.
(Multiple-answer | Prompted options)]

5.3 Operational dynamics in animation

Skills and creative process

- Techniques

Mode of production characteristics

- National coproduction
- International coproduction
- Services imports: Types Countries
- Outsourcing
  - Commercialization: Platforms Events
- Marketing: Platforms Events

Freelancer universe

- Virtual Production
- National x International Projects

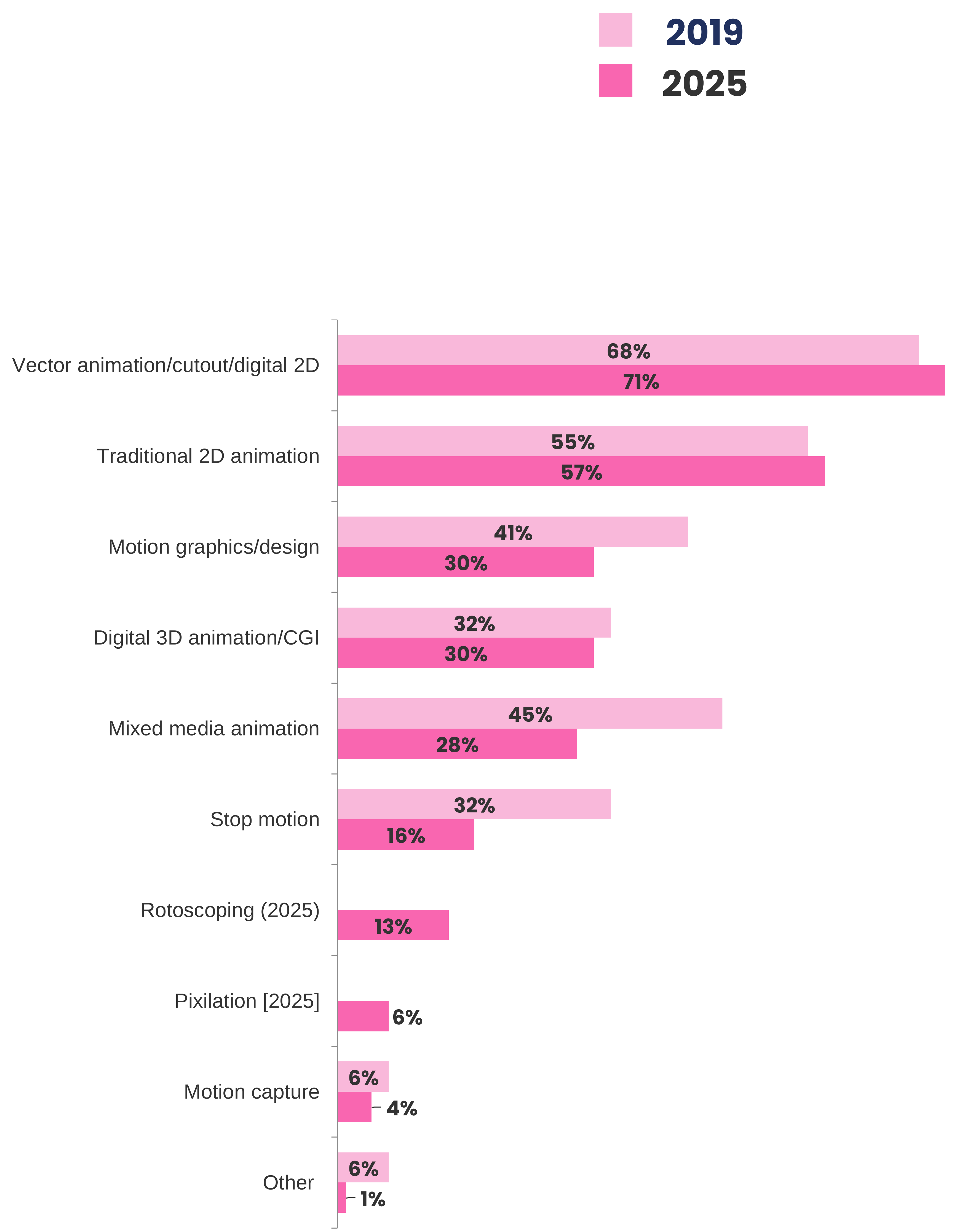
AI in animation's pipeline

- AI knowledge
- AI usage
- AI perspectives

Chosen techniques
Total of respondents

The techniques used most often (vector animation/cutout/digital 2D and traditional 2D animation) are still the same, with no big alterations since 2019.

There was a significant drop in stop motion usage in the 2019-2025 period.



Basis: total of respondents (2019: 453 | 2025: 386). Results in %.
Source: P12. Considering animation techniques, which are the most frequent in your company/institution's work? / If you are a freelancer, which are the most frequent in your work? / Choose all that apply.
(Multiple-answer, all that apply in both waves | Prompted options)
.

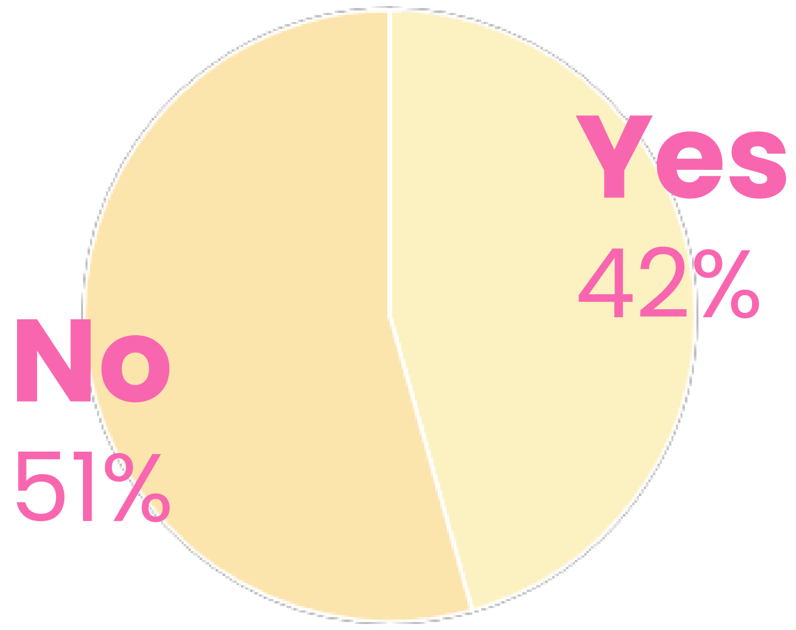
National coproduction
Total of respondents

National coproductions are heavily concentrated in the Southeast of the country, more specifically, in São Paulo and Rio de Janeiro, followed by Paraná and Rio Grande do Sul (both in the South). The North, Northeast and Central-West regions do not have significant participation in this context.

Total of **21 states** mentioned in distinct participations

2025

States	%	(continuação)	%
São Paulo | SP	69	Paraíba | PB	4
Rio de Janeiro | RJ	51	Espírito Santo | ES	4
Paraná | PR	18	Pará | PA	3
Minas Gerais | MG	14	Amazonas | AM	2
Rio Grande do Sul | RS	12	Alagoas | AL	1
Santa Catarina | SC	10	Rio Grande do Norte | RN	1
Pernambuco | PE	8	Maranhão | MA	1
Goiás | GO	7	Mato Grosso do Sul | MS	1
Ceará | CE	7	Mato Grosso | MT	1
Bahia | BA	7	Sergipe | SE	0
Distrito Federal | DF	6		
BASIS	**166**	**BASIS**	**166**



Basis: total of respondents (2025: 349). Results in %.
Source: P17. Has your company/institution ever worked in a national coproduction? If you are a freelancer, have you worked in projects/works in a national coproduction regime?
(Single-answer | Prompted options).

Basis: respondents who have already worked on national coproductions (2025: 166). Results in %.
Source: P17_1. Indicate 3 states in Brazil with whom your company/institution/you worked with the most in national coproductions.
(Multiple-answer | Unprompted response)

International coproduction
Total of respondents

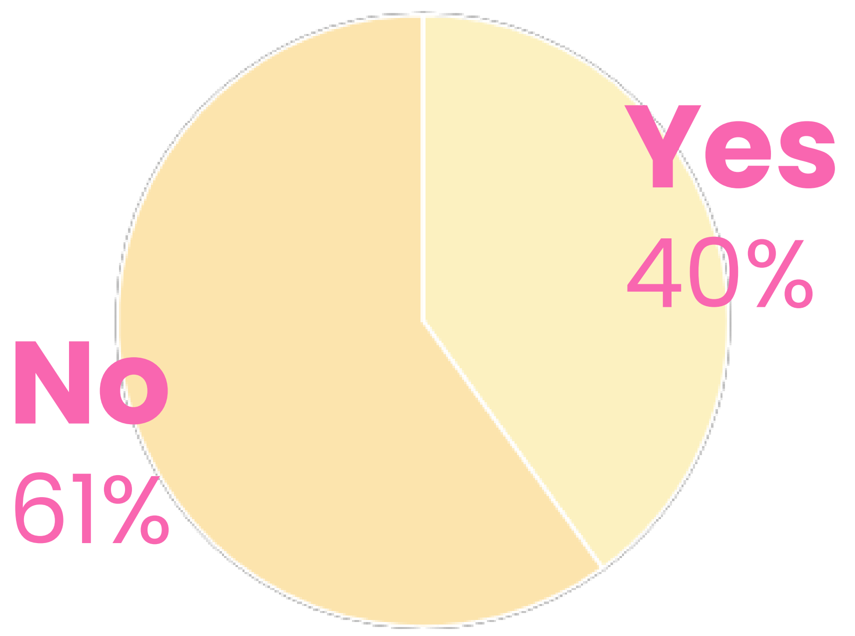
In 2025, 60% of companies stated they do not work in international coproductions. That shows there's great growth potential, if we make use of **opportunities** in the **international** market, notably, in Asia.

The countries with which we work in international coproductions are almost the same as the ones to whom Brazil exports products and services; namely, the U.S., followed by Canada and France.

Total of **39 countries** mentioned

2025

Countries	%
Usa	44
Canada	23
France	17
Portugal	13
Argentina	11
Mexico	11
Chile	11
Spain	9
Japan	4
China	4
Ireland	3
Peru	3
India	3
Germany	3
England	3
Venezuela	3
Australia	2
Uruguay	2
United Kingdom	2
Colombia	2
(continued)	**%**
Dubai	1
Congo	1
South Africa	1
Bolivia	1
Saudi Arabia	1
Costa Rica	1
Nigeria	1
Poland	1
Finland	1
Ecuador	1
South Korea	1
New Zealand	1
Italy	1
Slovenia	0
Mozambique	0
Hong Kong	0
Kenya	0
Russia	0
Netherlands	0
BASIS	**130**



Basis: total of respondents (2025: 341). Results in %.
Source: P18. Has your company/institution ever worked in an international coproduction? If you are a freelancer, have you ever worked in projects/works in an international coproduction regime?
(Single-answer | Prompted options).

Basis: respondents who have already worked on international coproductions (2025: 130). Results in %.
Source: P18_1. Indicate 3 countries with whom your company/institution/you worked with the most in international coproductions.
(Multiple-answer | Unprompted response)

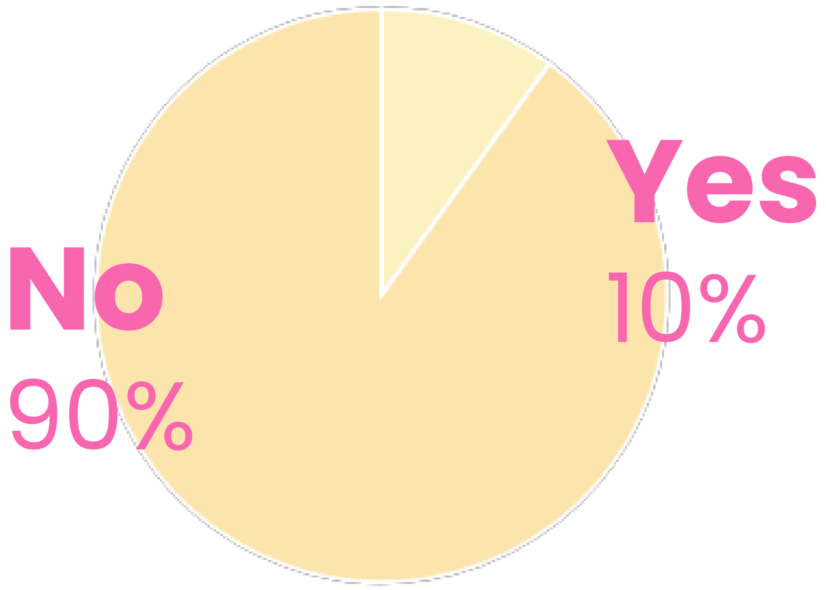
Import of services in animation's pipeline
Total of respondents

The proportion of those who import animation services is noticeably low, possibly due to unfavorable monetary exchange rates and to high availability of local talent.

2025

Services	%
Animation	74
Musical composition	18
Character design	18
Clean up	17
Animation sets	16
Storyboard	15
Original dubbing	14
VFX	14
Production	14
Visual compositing	14
Animation sound (recording, SFX, foley)	13
Coloring	13
Production design	13
Rigging	12
Distribution	12
Mentoring/consulting/advising	12
Executive producing	12
BASIS	**33**

(continued)	%
Screenwriting	12
Animatic	11
Editing	10
Modeling	10
Outher	8
Directing	8
Illustration services	8
Consulting	7
Exhibiting	5
Creative executive production	5
Motion graphics	3
Supervision	2
Training/qualification	-
Motion capture	-
Augmented reality	-
Virtual reality	-
Mixed reality	-
BASIS	**33**



Basis: total of respondents (2025: 333) Results in %.
Source: P21. Has your company/institution ever imported services in the animation's productive pipeline from other countries? If you are a freelancer, have you ever imported animation services from other countries?
(Single-answer | Prompted options)

Basis: respondents who have imported animation services (2025: 33) Results in %.
Source: P22. Which services do you import more frequently?
(Multiple-answer, all that apply | Prompted options)

Import of services in animation's pipeline
Total of respondents

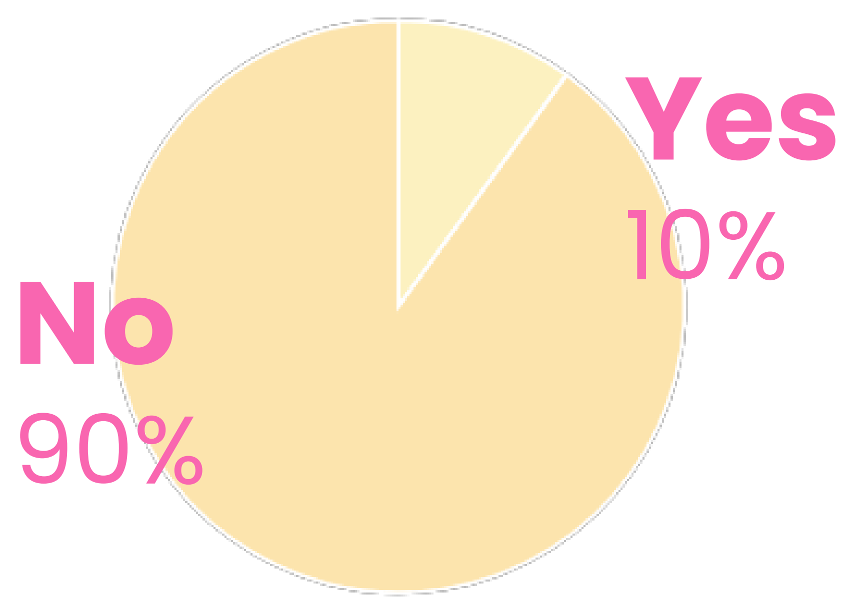
Once again, the U.S. and France stand out as service suppliers to Brazilian animation, and are also the main countries with which we export services and make coproductions. That fact highlights the need to diversify foreign markets.

Total of **25 countries mentioned** as Brazilian animation's suppliers

2025

Countries	%
USA	32
Argentina	28
France	23
India	18
Peru	10
Russia	9
Chile	9
Mexico	8
United Kingdom	8
Germany	8
China	8
Portugal	8
Thailand	6
BASIS	**31**

(continued)	%
Ireland	5
Canada	4
Philippines	3
Iran	3
South Africa	3
Netherlands	3
Australia	2
Mozambique	2
Kwait	2
Italy	2
Spain	2
Venezuela	2
BASIS	31

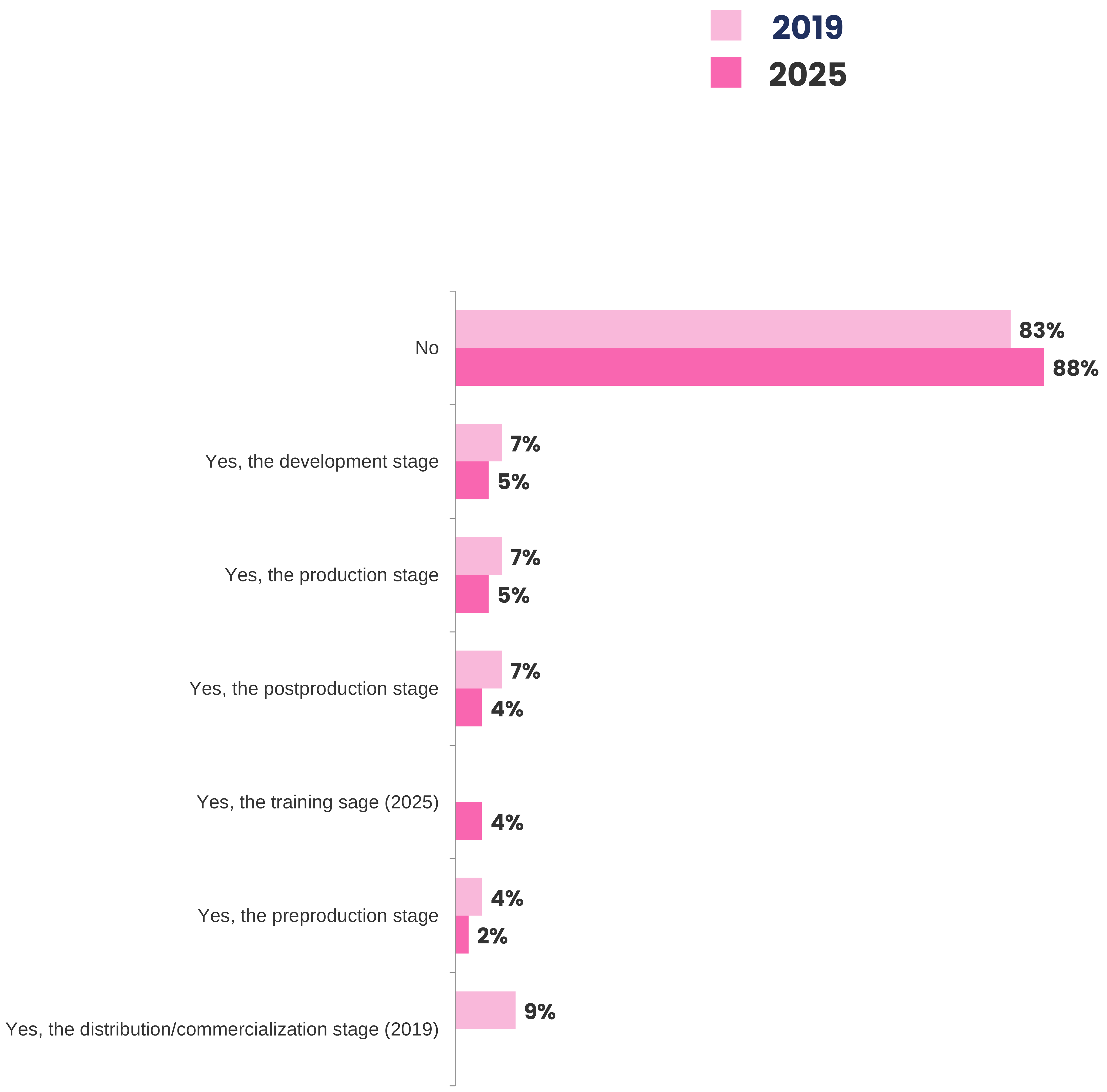


Basis: total of respondents (2025: 333) Results in %.
Source: P21. If you are a freelancer, have you ever imported animation services from other countries?
(Single-answer | Prompted options)

Basis: respondents who have imported animation services (2025: 33) Results in %.
Source: P23. Mention 3 countries from whom your company/institution imports animation services the most.
(Multiple answer | Unprompted responses)

Outsourcing the production process outside of Brazil

Total of respondents



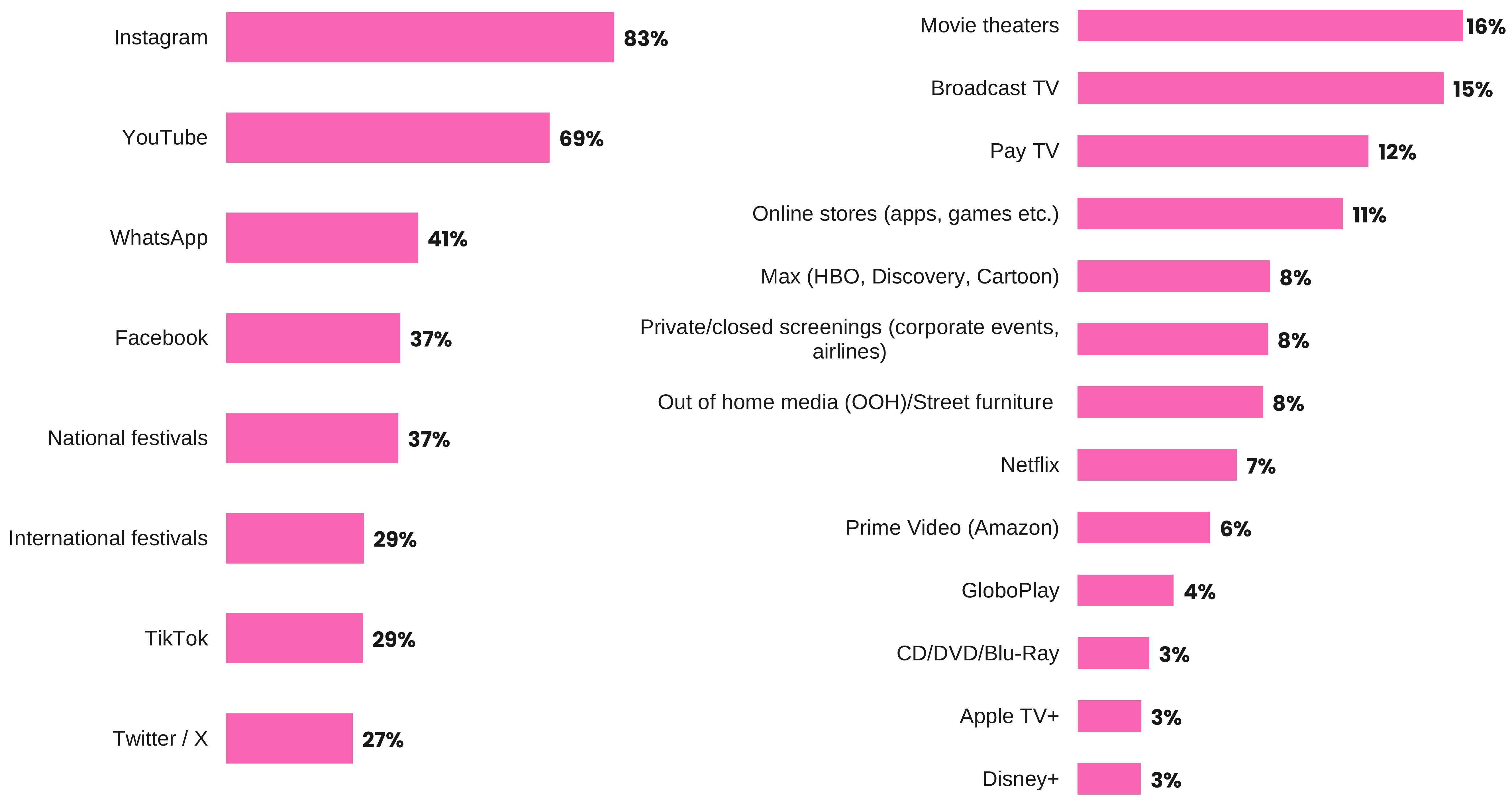
Basis: total of respondents (2019: 455 | 2025: 277) Results in %.
Source: P33. Does any part of your production process happen outside of Brazil (outsourcing)? (Multiple-answer, all that apply in both waves | Prompted options)

.

Platforms: Promotion
Total of respondents

Social media and festivals are the main promotional platforms, followed by TV channels, movie theaters and online stores.

2025



Basis: total of respondents (2025: 288) Results in %.
Source: P24_2. Which platforms are used for commercialization/distribution and promotion? (Multiple answer | Prompted options)

Platforms: Commercialization

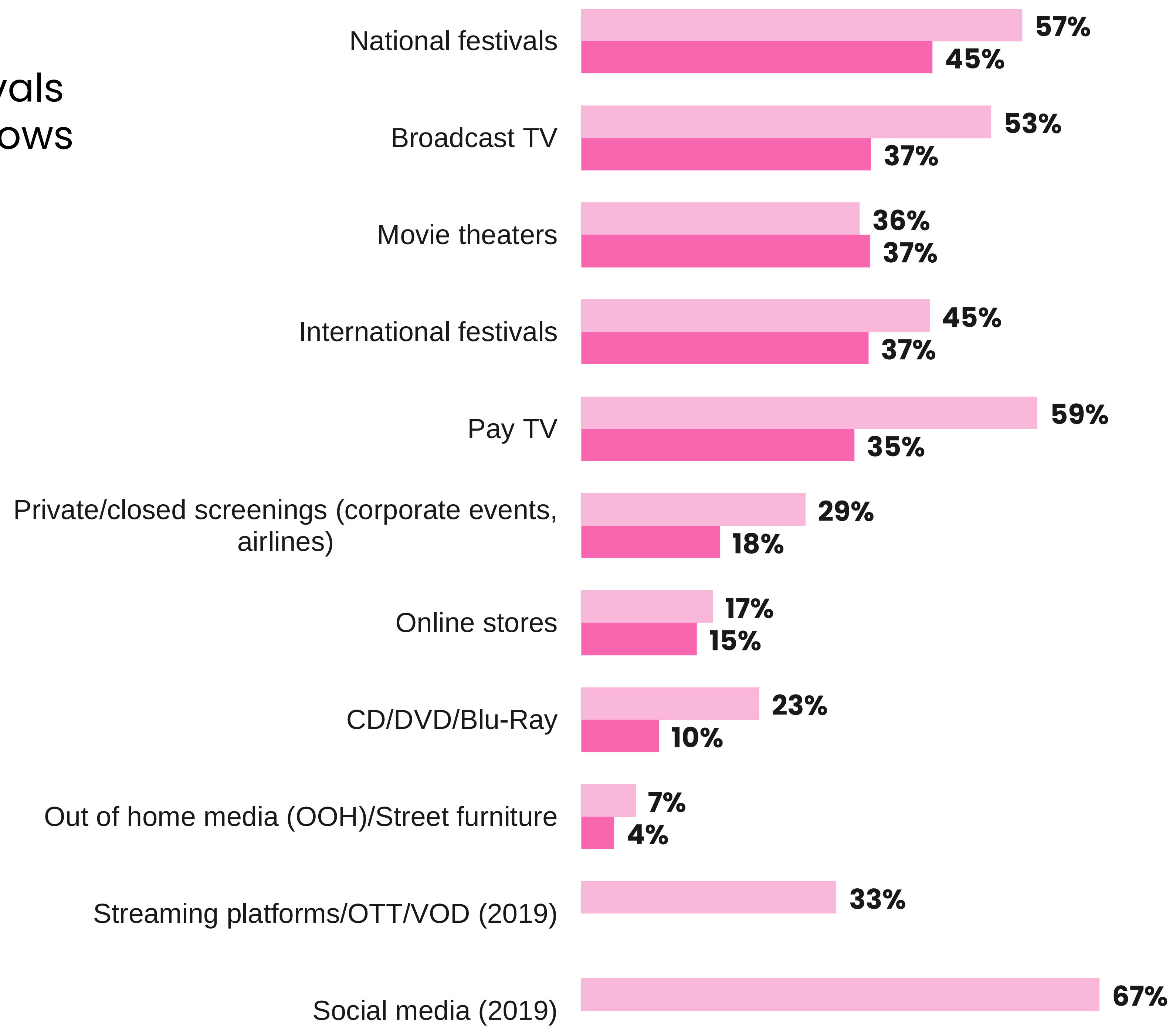
Total of respondents

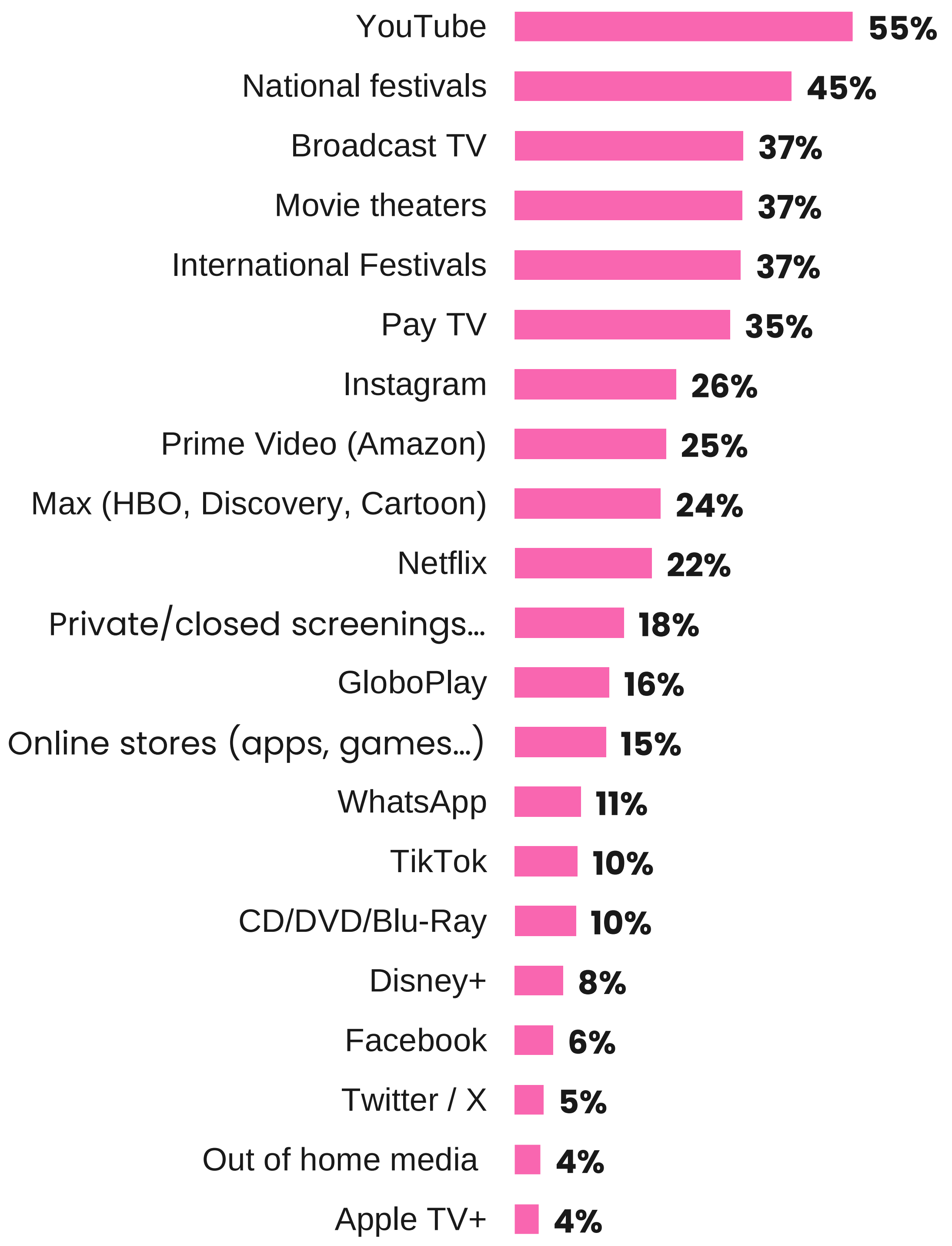
There is evident digital convergence, considering social media and streaming platforms dominate the promotion segment, and also commercialization. In 2019, they represented over double the percentage of other platforms (festivals, online stores, games etc.). Traditional media, such as broadcast and pay TV, although showing considerable decline in the 2019-2025 period, are still relevant, specially to bigger companies.

National and international festivals are still important visibility windows for commercialization.

2019
2025

Comparison between **2019-2025,** isolating social media and streaming, which were individually included in 2025





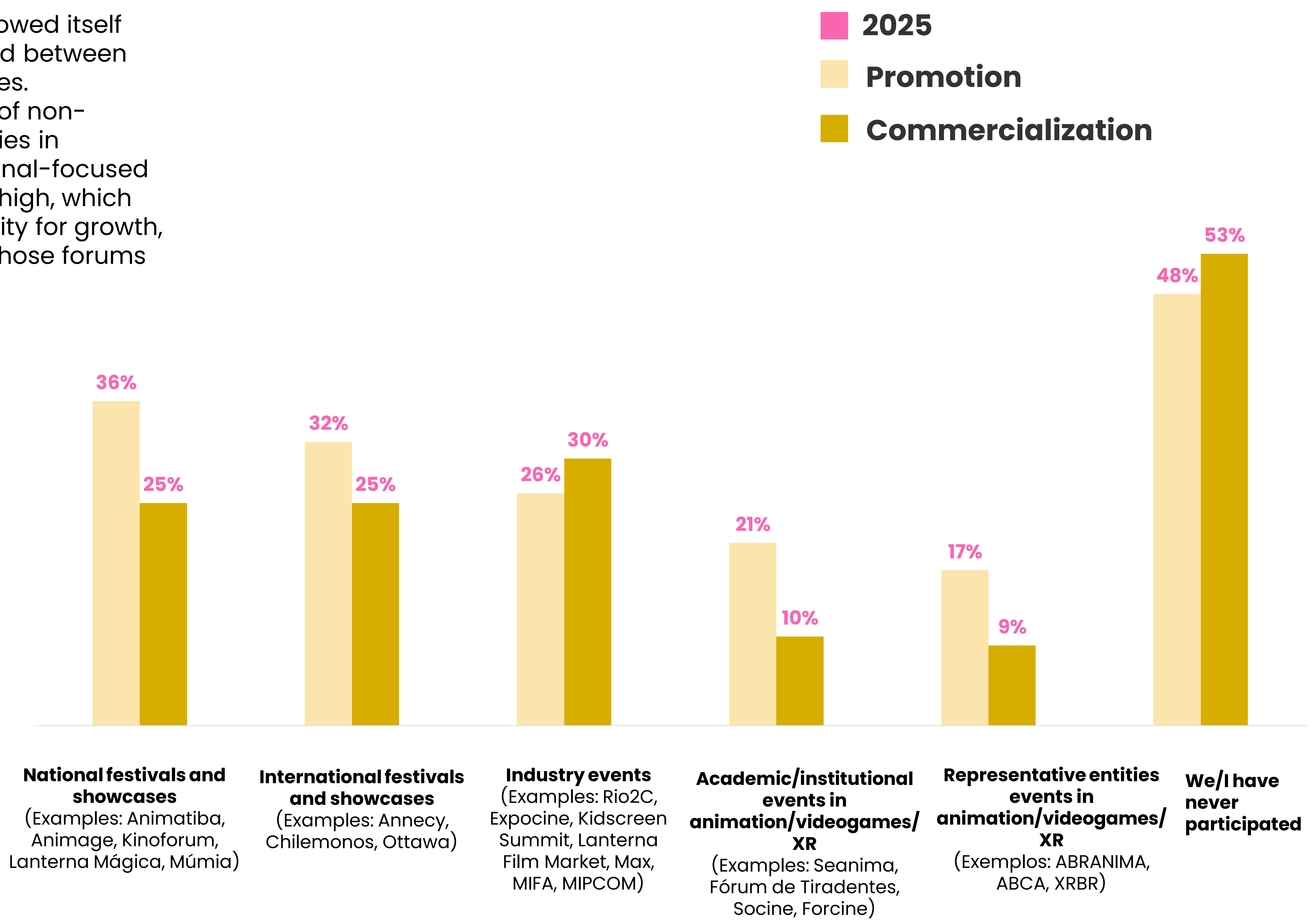
Basis: total of respondents (2019: 453 | 2025: 262) Results in %.
Source: P19. P24_1. Which platforms are used to distribute produced content? (COMMERCIALIZATION).
(Multiple answer, all that apply in both waves | Prompted options)

Basis: total of respondents (2025: 262) Results in %.
Source: P24_1. Which platforms are used in commercialization/distribution and promotion? (COMMERCIALIZATION)
(Multiple-answer | Prompted options)

Event participation: Promotion and commercialization

Total of respondents

Event participation showed itself to be evenly distributed between the surveyed categories. However, the number of non-participating companies in commercial/promotional-focused events is expressively high, which indicates an opportunity for growth, if the participation in those forums were amplified.



Basis: total of respondents (2025: 216) Results in %.
Source: P42. Which kinds of events has your company/have you participated in the last 3 years? Take separate notes of which had commercial goals, and which were destined to projects marketing/promotion.
(Multiple-answer, all that apply | Prompted options)

Event participation: marketing/promotion and commercialization
Total of respondents

2025

Event participation: Promotion	TOTAL	Company	Freelancer
	%	%	%
National festivals and showcases (Examples: Animatiba, Animage, Kinoforum, Lanterna Mágica, Múmia).	36	50	26
International festivals and showcases (Examples: Annecy, Chilemonos, Ottawa)	32	45	22
Industry events (Examples: Rio2C, Expocine, Kidscreen Summit, Lanterna Film Market, Max, MIFA, MIPCOM)	26	43	13
Representative entities events in animation/videogames/XR (Examples: ABRANIMA, ABCA, XRBR)	17	27	10
Academic/institutional events in animation/videogames/XR (Examples: Seanima, Fórum de Tiradentes, Socine, Forcine)	21	27	15
We/I have never participated	48	28	64

Event participation: Commercialization	TOTAL	Company	Freelancer
	%	%	%
National festivals and showcases (Examples: Animatiba, Animage, Kinoforum, Lanterna Mágica, Múmia)	25	31	20
International festivals and showcases (Examples: Annecy, Chilemonos, Ottawa)	25	31	20
Industry events (Examples: Rio2C, Expocine, Kidscreen Summit, Lanterna Film Market, Max, MIFA, MIPCOM)	30	57	9
Representative entities events in animation/videogames/XR (Examples: ABRANIMA, ABCA, XRBR)	9	15	4
Academic/institutional events in animation/videogames/XR (Examples: Seanima, Fórum de Tiradentes, Socine, Forcine)	10	14	6
We/I have never participated	53	31	71

Basis: total of respondents (2025: 216); Freelancers (2025: 134). Results in %.
Source: P42. Which kinds of events has your company/have you participated in the last 3 years? Take separate notes of which had commercial goals, and which were destined to projects marketing/promotion.
(Multiple-answer, all that apply | Prompted options)

Event participation: marketing/promotion and commercialization

Total of respondents

Companies participated more in festivals and industry-specific events than freelancers – both for promotion and commercialization.
However, it is still a low number, considering how important these events are for business opportunities, benchmarking, networking and forming collaborations.

Regarding company size, smaller ones have lower numbers in event participation. Something to keep in mind is the high percentage of freelancers who claim not participating in commercial-focused (71%) and promotion/marketing-focused (64%) events.

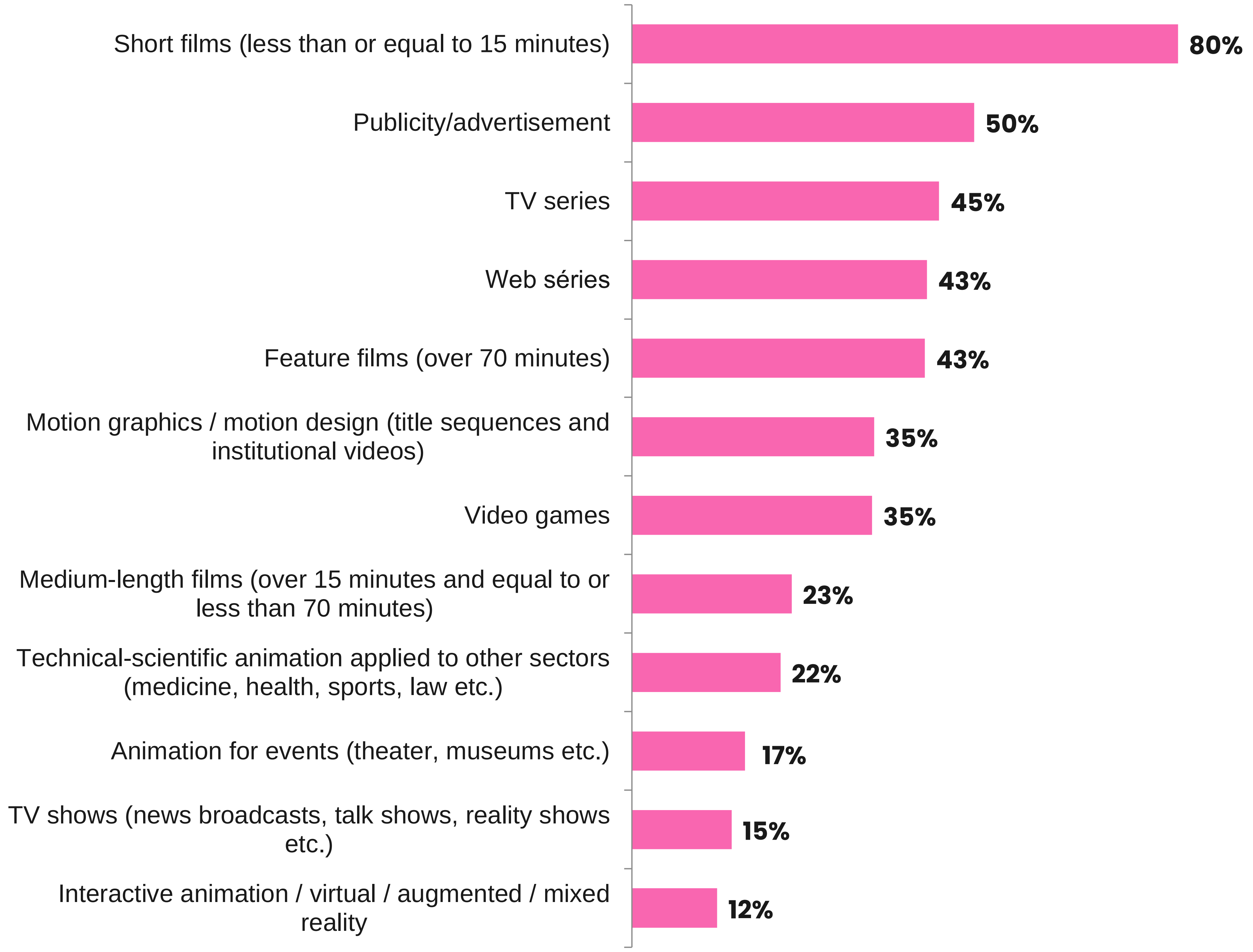
Another point worth noting is the low participation in representative entities events, in the animation/videogames/XR segment – relevant in the advocacy aspect –, as well as academic/institutional events, both from companies and freelancers.

Freelancers who work with virtual production

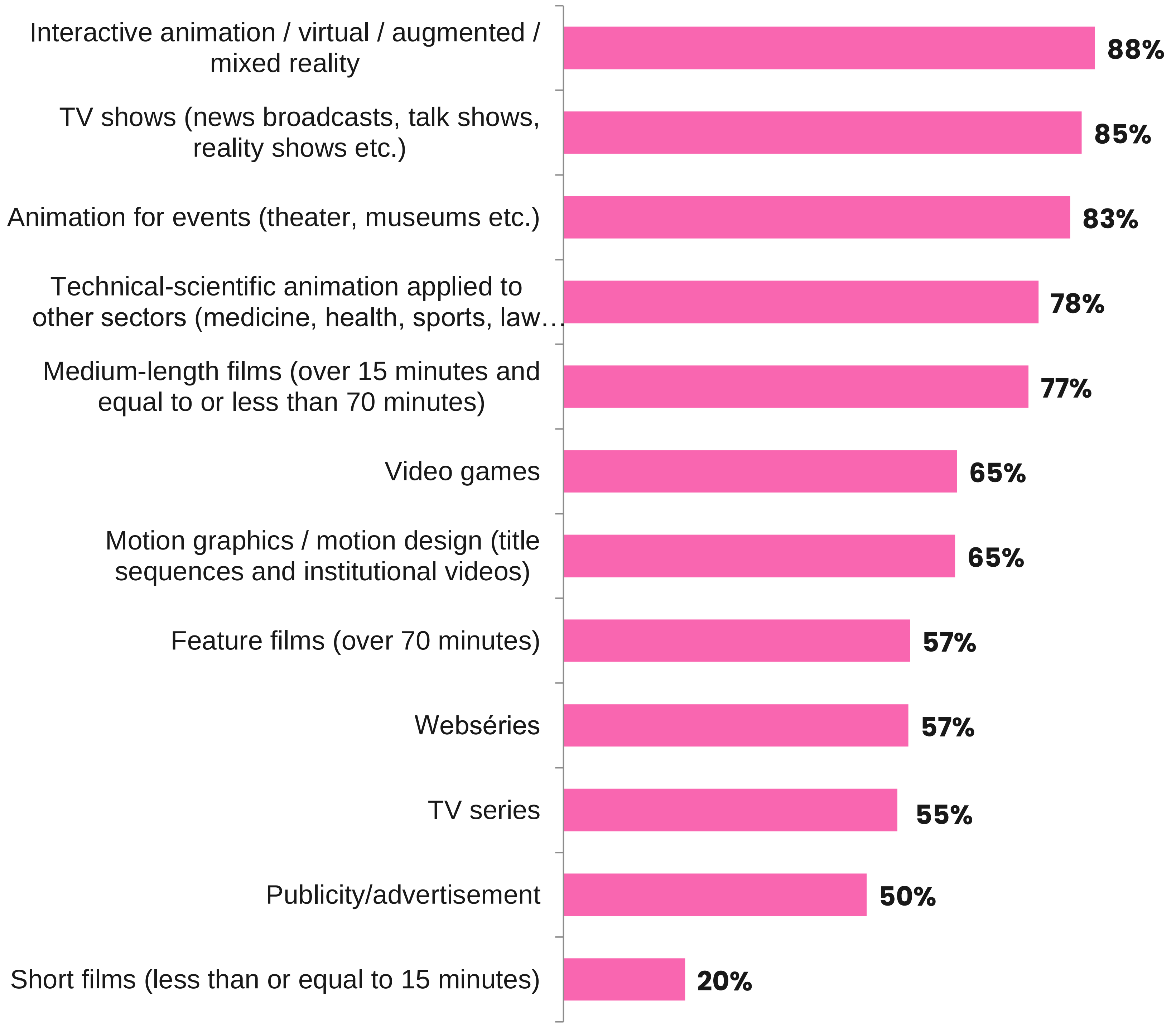
Freelancers

2025

Yes, they have already worked with virtual production in...



They have NEVER worked with virtual production in...



Basis: freelancers (2025: 208). Results in %.
Source: P15. As a freelancer, have you ever worked in virtual productions?
(Multiple answer, all that apply | Prompted options)
.

Distribution between national and international projects

Freelancers

We highlight the remarkably low percentage of freelancers who work exclusively with international companies (2%).

2025

***Freelancers* performance in projects/works done to national and international companies**	
	%
Only national companies	**45**
Only international companies	**2**
Mix of national and international companies **National (69%)** **International (31%)**	**53**
TOTAL	**100**

Basis: freelancers (2025: 183). Results in %
Source: P20. As a freelancer/solo contractor in animation, what is the percentage of your joint work with national and international companies?
(Multiple-answer | Prompted options)

AI knowledge level
Total of respondents

We have introduced some questions about Artificial Intelligence in the second edition of this Mapping, and we observed that 96% of respondents claim to have knowledge on the subject to a certain degree. Is this knowledge impactful to the usage of these new technologies?

AI investments and automation can reduce operational costs and increase competition in the international market.

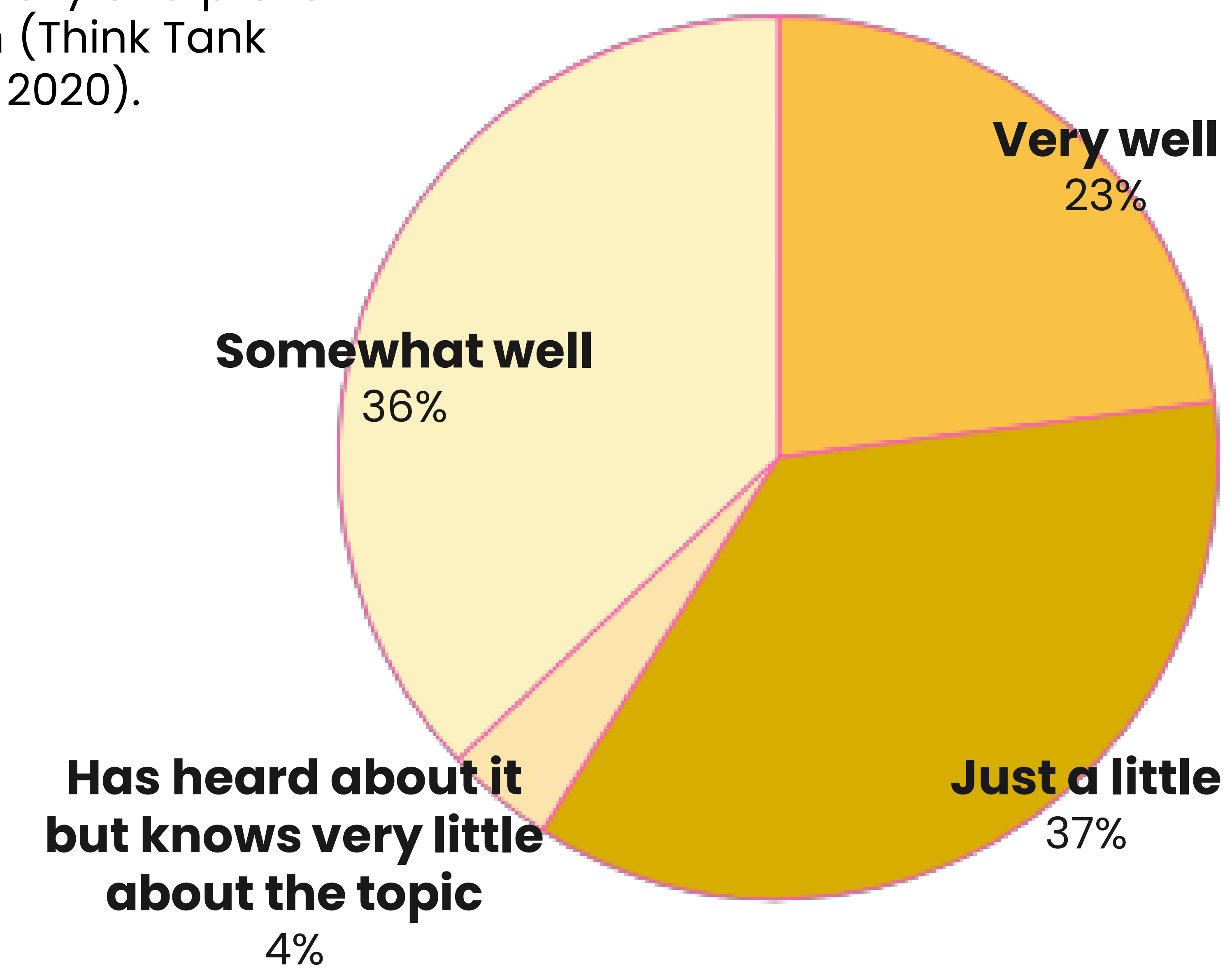
What is the impact of artificial intelligence usage in the animation segment, considering opportunities, challenges and political implications? How is the Brazilian animation sector making the most of digitalization and artificial intelligence to increase competition in products and services?

Digital tools and artificial intelligence can transform creative services to a significant extent, increasing cost efficiency and amplifying clients' experiences.

Artificial intelligence usage allows the creation of innovative content, and efficient data analysis can better creative services' access and accessibility.

However, regarding quality control in artificial intelligence content, potential algorithm biases and the need for human supervision pose challenges that demand transparent and auditable solutions, in order to preserve cultural diversity and prevent cultural appropriation (Think Tank European Parliament, 2020).

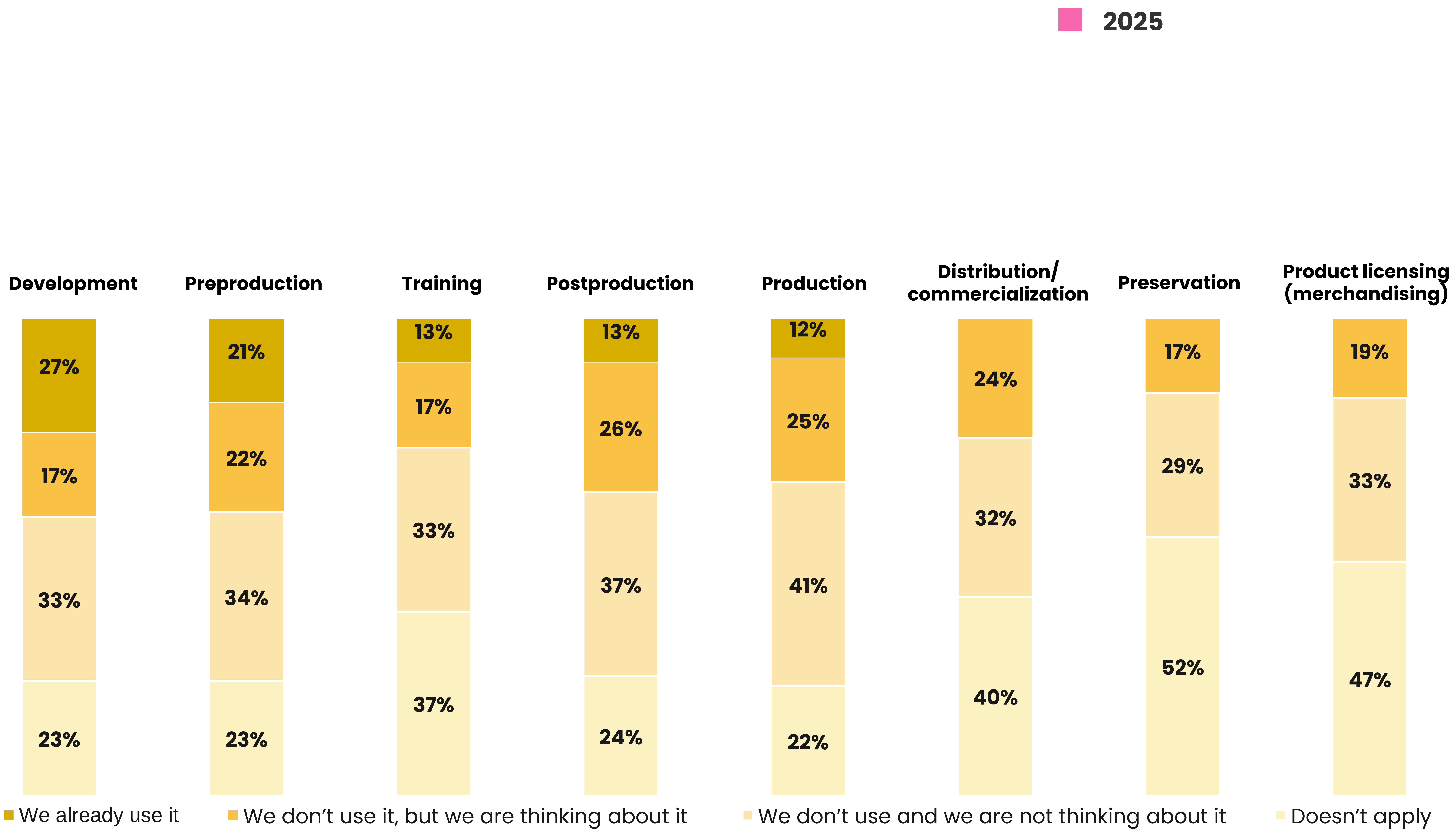
2025



Basis: total of respondents (2025: 251)
Source: P46 (RU-EST) Would you say you know Artificial Intelligence?
THINK TANK EUROPEAN PARLIAMENT, 2020.
https://www.europarl.europa.eu/thinktank/en/document/IPOL_BRI(2020)629220
Access on: 07/15/25.

Usage of AI in animation's pipeline

Total of respondents



Basis: total of respondents (2025: 251).
Source: P47. Check the option that corresponds to the stage at which your company/institution is regarding Artificial Intelligence usage in each step of the animation pipeline. In case you are a freelancer, check the stage of your own usage.
(Single-answer per item | Prompted options)

Usage of AI in animation's pipeline

Total of respondents

The low percentage of respondents who claim to use artificial intelligence on different steps of the production pipeline reflects that, despite being an opportunity to be more productive and reduce costs, there is also the risk of losing jobs, challenges related to copyright, among others.

Artificial intelligence can support the development process (27%) – the biggest percentage of AI usage in the pipeline – by, for example, helping create projects for financial aid, and increasing cost efficiency throughout a project's pipeline.

Usage of AI in animation's pipeline

Total of respondents

2025

Have utilized it

Segment	TOTAL	Company	Freelancer
	%	%	%
Training	13	15	12
Development	27	40	17
Prepoduction	21	30	14
Production	12	15	10
Postproduction	13	17	10
Distribution/commercialization	4	4	3
Product licensing	1	1	1
Preservation	2	2	1

Time of operation	TOTAL	20+ years	Between 10 and 20 years	Between 5 and 10 years	Until 5 years
	%	%	%	%	%
Formation	13	21	12	12	12
Development	27	49	30	15	24
Prepoduction	21	34	27	17	13
Production	12	11	19	6	12
Postproduction	13	12	20	12	9
Distribution/ commercialization	4	2	5	4	3
Product licensing	1	0	5	0	0
Preservation	2	0	5	2	0

Basis: total of respondents (2025: 251); Companies (2025: 141); up to 20 years (2005: 38); Between 10 and 20 years (2005: 61); Between 5 and 10 years (2025: 59); Up to 5 years (2005: 93)[VG7.1]
Source: P47. Check the option representing the stage at which your company/institution is regarding Artificial Intelligence usage in each step of the animation pipeline. In case you are a freelancer, check the stage of your usage.
(Single-answer per item | Prompted options)

Usage of AI in animation's pipeline
Total of respondents

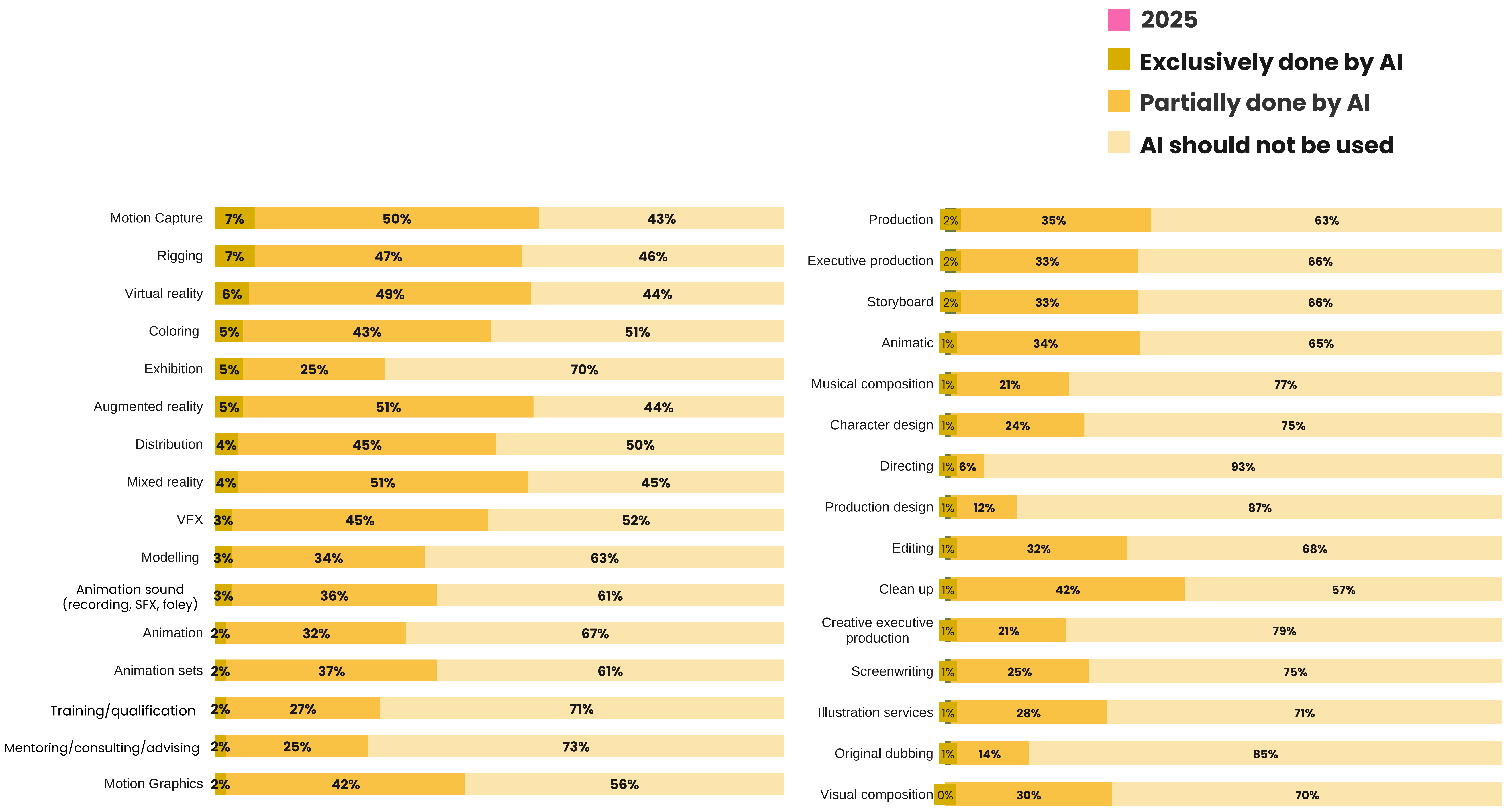
Companies in the sector, when compared to freelancers, adhere more to AI usage (more than double the percentage on the "development" and "preproduction" stages), as well as companies which have been active longer.

Regarding the challenges of AI usage, freelancers and younger companies fear impact on employability. It is important to highlight that recent research shows that generative artificial intelligence competes with qualified jobs (knowledge workers). Nevertheless, they also show that creative services can be more resilient towards automation – while the risk of automation in the global economy is 14%, in positions related to creative and cultural areas, it is 10% (BERG et al., 2025).

BERG, Janine et al. AI and Jobs. International Labour Organization. Available at: https://www.ilo.org/publications/generative-ai-and-jobs-refined-global-index-occupational-exposure. Access on: 10/20/2025.

Perspectives of AI usage in animation's pipeline activities

Total of respondents



Basis: total of respondents (2025: 246)
Source: P48. In your opinion, in which activities could artificial intelligence be used more frequently? In which ones should it not be used at all? Check as many items as you wish in each column.
(Single-answer per item | Prompted options)

Perspectives of AI usage in animation's pipeline activities

Total of respondents

The steps in which artificial intelligence could be more used coincide with services related to automation/technology (augmented, virtual, mixed reality, motion capture and rigging). To most respondents, in original dubbing, directing and production design, AI should not be used at all (the lack of regulation creates an environment of suspicion around the lack of information about artificial intelligence's systems interaction).

5.4 Human capital – Companies

Human resources applied to animation (companies)

Number of employees in companies

Physical and remote placement of employees

Positions and hires (Companies)

Activities with permanent professionals

Hiring criteria

Hard-to-hire activities

Remuneration in the market

Direct experience (Respondents)

Activities executed by respondents

Personal remuneration of respondents

Number of collaborators in companies

Companies

In 2025, we observed companies with around 21 collaborators, on average. It is notable that the vast majority of companies are small-sized (1 or more employees), contrasting with a small number of companies with many collaborators (215).

2019
2025

How many people work on your company/institution?

Average	11
Interval	1 a 80
BASIS	179

Regardless of employment regime, what is the smallest and largest number of people who have worked on your company/institution in the last year?

Average	21
Interval	1 a 215
BASIS	109

Basis: companies (2019: 179).
Source: P30. How many people work on your company/institution?
(Single-answer | Unprompted response)

Basis: companies (2025: 109).
Source: P32. Regardless of employment regime, what is the smallest and largest number of people who have worked on your company/institution in the past year?
(Multiple-answer | Unprompted answers)

Physical / remote placement of employees

Companies

The physical placement of collaborators showed great transformation in the past 6 years, influenced not only, but mostly, by the Pandemic.
We observed an inversion in the period analyzed: the percentage of collaborators placed in the companies' headquarters went from 68% in 2019 to 34% in 2025, while remote positions grew from 30% to 64% in the same period.

2019
2025

2019

	%	%
Average – in headquarters	68	68
Average – Remote – in the same city	22	30
Average – Remote – in the same state	3	
Average – Remote – in another state	5	
Average – Remote – in a foreign country	2	2
TOTAL		**100**
BASIS		**179**

2025

	%
Average – in headquarters	34
Average – Remote in Brazil	64
Remote in a foreign country	2
TOTAL	**100**
BASIS	**127**

Basis: companies (2019: 179 | 2025: 127). Results in %.
Source: P34. Where are the professional collaborators in your company/institution placed? (Multiple-answer | Unprompted answers)

Activities with permanent professionals
Companies

In 2025, among the main positions with permanent professionals, four of them stand out, related to business management: Manager (55%), Executive Producer (40%), Creative Executive Producer (33%) and Finance/Accounting (30%). This could mean there is an effort to qualify and formalize this segment in the audiovisual sector.

2019
2025

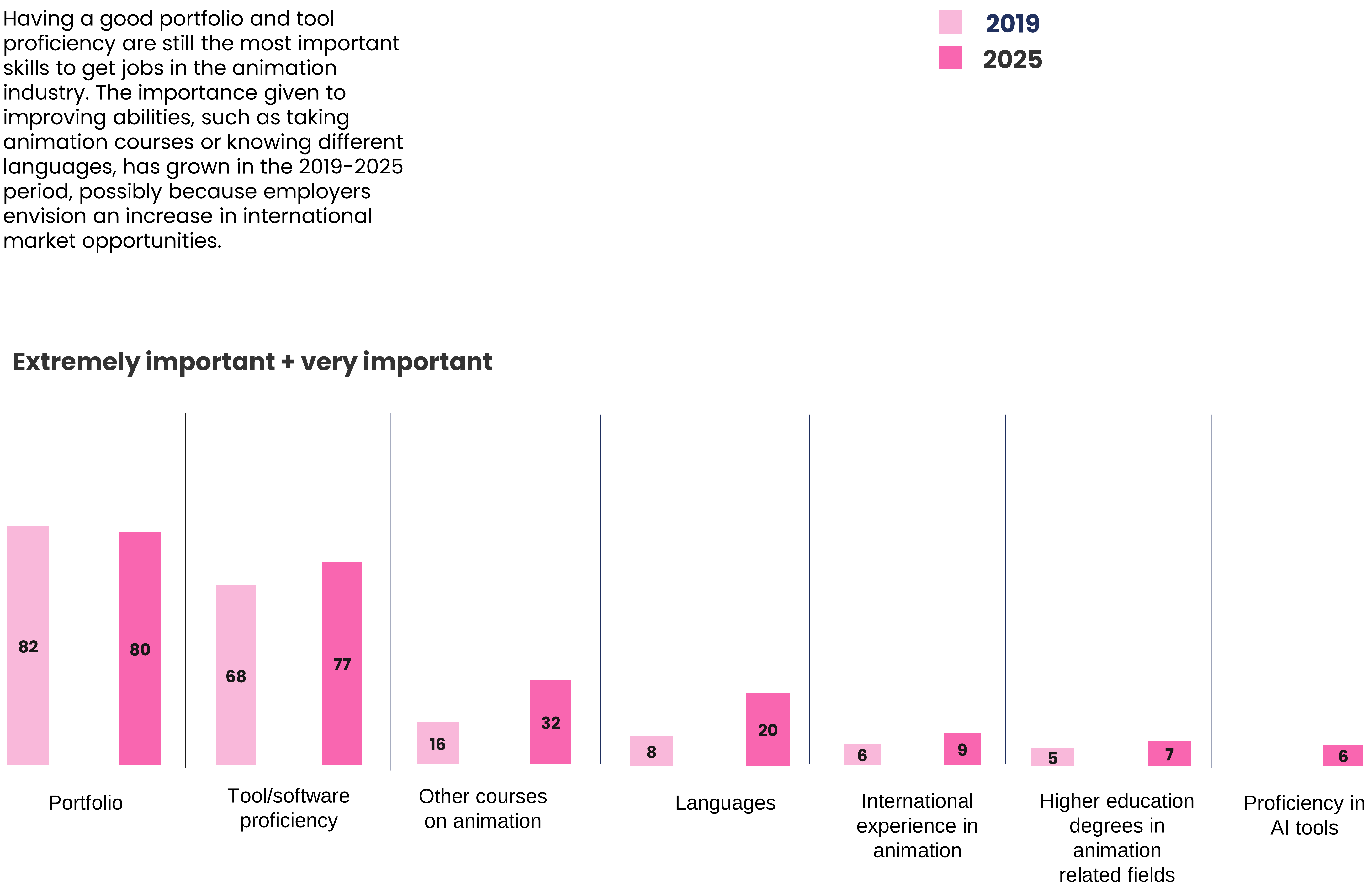
	2019	2025	Variation (over 5 points)
	%	%	
Management	**59**	**55**	
Director	**49**	**54**	
Animator	**49**	**41**	↓
Executive producer	**39**	**40**	
Producer	**33**	**36**	
Animation director	**27**	**34**	↑
Creative executive producer (2025)		**33**	
Screenwriter	**23**	**32**	↑
Finance (2019) | Finance/accounting (2025)	**30**	**30**	
Production designer	**28**	**29**	
Editor	**30**	27	
Concept artist	20	24	
Character designer	15	19	
Team/people manager (2025)		18	
Designer	21	18	
Storyboarder	12	18	
Set designer	11	18	↑
Rigger	9	15	↑
Legal	10	14	

	2019	2025	Variation (over 5 points)
	%	%	
IT support/technician	9	13	
Generalist	10	11	
Visual effects	8	11	
Animation intern	8	10	
Visual compositor/artist (2019) | Visual compositor (2025)	6	9	
3D Modeler	13	9	
Clean-up artist (2025)		9	
Assistant director (2025)		9	
Assistant animator	8	7	
Color artist	5	7	
Look dev	4	6	
Musical composer	2	6	
Sound	6	5	
2D Modeler	6	3	
Rendering artist	6	3	
GUI designer	2	1	
Consultant (2025)		-	
Composition artist (2019)	5		
Outher		14	

Basis: companies (2019: 179 | 2025: 124). Results in %.
Source: P36. To which positions below does your company/institution have permanent professionals?
(Mutiple-answer (2019: 6 or more mentions | 2025: up to 3 mentions) | Prompted options)

Hiring criteria
Companies

Having a good portfolio and tool proficiency are still the most important skills to get jobs in the animation industry. The importance given to improving abilities, such as taking animation courses or knowing different languages, has grown in the 2019-2025 period, possibly because employers envision an increase in international market opportunities.



Basis: companies (2019: 178 | 2025: 125). Results in %.
Source: P35. When you hire someone, how important it is to have:
(Single-answer per item | Prompted options)

Hard-to-find/hire professionals
Companies

2019
2025

	2019	2025	Variation (over 5 points)
	%	%	
Animator	32	27	
Rigger	22	22	
Animation director	21	18	
Executive producer	27	17	↓
Creative executive producer (2025)		16	
Management	12	14	
Team/people manager (2025)		13	
Screenwriter	23	13	↓
Storyboarder	14	11	
Producer	18	11	↓
Director	11	10	
Legal	10	10	
Character designer	8	9	
3D Modeler	12	8	
Finance (2019) | Finance/accounting (2025)	6	7	
Clean-up artist (2025)		7	
Production designer	6	6	
Consultant (2025)		6	
Visual effects	8	6	

	2019	2025	Variation (over 5 points)
	%	%	
Concept art	5	6	
Visual compositor/artist (2019) | Visual compositor (2025)	6	5	
Color artist	7	5	
Assistant animator	4	4	
Sound	3	4	
Rendering artist	6	4	
Assistant director (2025)		3	
Set designer	5	3	
Look dev	3	3	
IT support/technician	5	2	
Generalist	7	2	
Editor	2	2	
Musical composer	4	2	
Animation intern	3	2	
Designer	4	1	
GUI designer	2	1	
2D Modeler	3	1	
Composition artist (2019)	2		

Basis: companies (2019: 179 | 2025: 119). Results in %.
Source: P37. Considering the positions below, which do you consider to be the HARDEST to hire/find in the market?
(Multiple-answer (2019: up to 3 mentions | 2025: up to 3 mentions) | Prompted options)

Average remuneration of professionals in technical fields

Companies

2019
2025

Average	R$ 4.701
Inflation accounting done by Central Bank of Brazil's calculator (6/2019 to 6/2025)	R$ 7.612
Interval	1.000 – 15.000
BASIS	152

Average	R$ 5.217
Interval	1.138 – 19.975
BASIS	101

Basis: companies (2019: 152)
Source: P38. What is the average monthly payment to an artistic/creative professional in your company/institution with 5 years of experience? (Single-answer | Unprompted answers)

Basis: companies (2025: 101);
Source: P38. What is the average monthly payment to an artistic/creative professional (excluding producers and directors) in your company/institution with 5 years of experience?

Activities carried out by respondents

Total of respondents

2019
2025

	2019 %	2025 %
Animator	**77**	**45**
Director	**46**	**22**
Management	19	**21**
Creative executive producer (2025)		**18**
Production designer	**36**	**16**
Animation director	**42**	**14**
Screenwriter	**35**	**14**
Set designer	22	**12**
Executive producer	14	**12**
Producer	24	**12**
Editor	**35**	10
Concept art	**28**	9
Rigger	20	9
Generalist		8
Storyboarder	**40**	8
Designer	**31**	7
Character designer	**33**	7
Assistant animator	14	6
Team/people manager		6

	2019 %	2025 %
3D Modeler	12	5
Visual effects	23	4
Color artist	17	4
Finance (2019) | Finance/accounting (2025)	6	3
Clean-up artist (2025)		3
Assistant director (2025)		2
Sound	-	2
Visual compositor/artist (2019) | Visual compositor (2025)	-	2
Consultant (2025)		1
Look dev	2	1
Rendering artist	10	1
Sound	9	-
2D Modeler	9	-
Musical composer	5	-
IT support/technician	4	-
GUI designer	3	-
Animation intern	2	-
Compositor artist (2019)	10	

Basis: total of respondents (2019: 279 | 2025: 268). Results in %.
Source: P45. P39. Which of the following activities do you carry out at work?
(Multiple-answer (2019: 6+ mentions | 2025: up to 3 mentions) | Prompted options)

Obs: In 2019, respondents were able to check as many options as they wished; in 2025, that number was restricted to 3.

Respondents' personal remuneration average

Total of respondents

2019
2025

Average	R$ 4.930
Inflation accounting done by Central Bank of Brazil's calculator (6/2019 to 6/2025)	R$ 7.980
Interval	1.000 – 24.000
BASIS	191

Average	R$ 7.010
Interval	1.138 – 56.925
BASIS	242

Basis: total of respondents (2019: 191)
Source: P44. What is your monthly income, on average?
(Single-answer | Unprompted answers)

Basis: total of respondents (2025: 242)
Source: P42. What is your monthly income, on average?
(Single-answer | Prompted options)

5.5 Animation Finances

Financial volume and turnover

Revenue

Financial management and cash flow

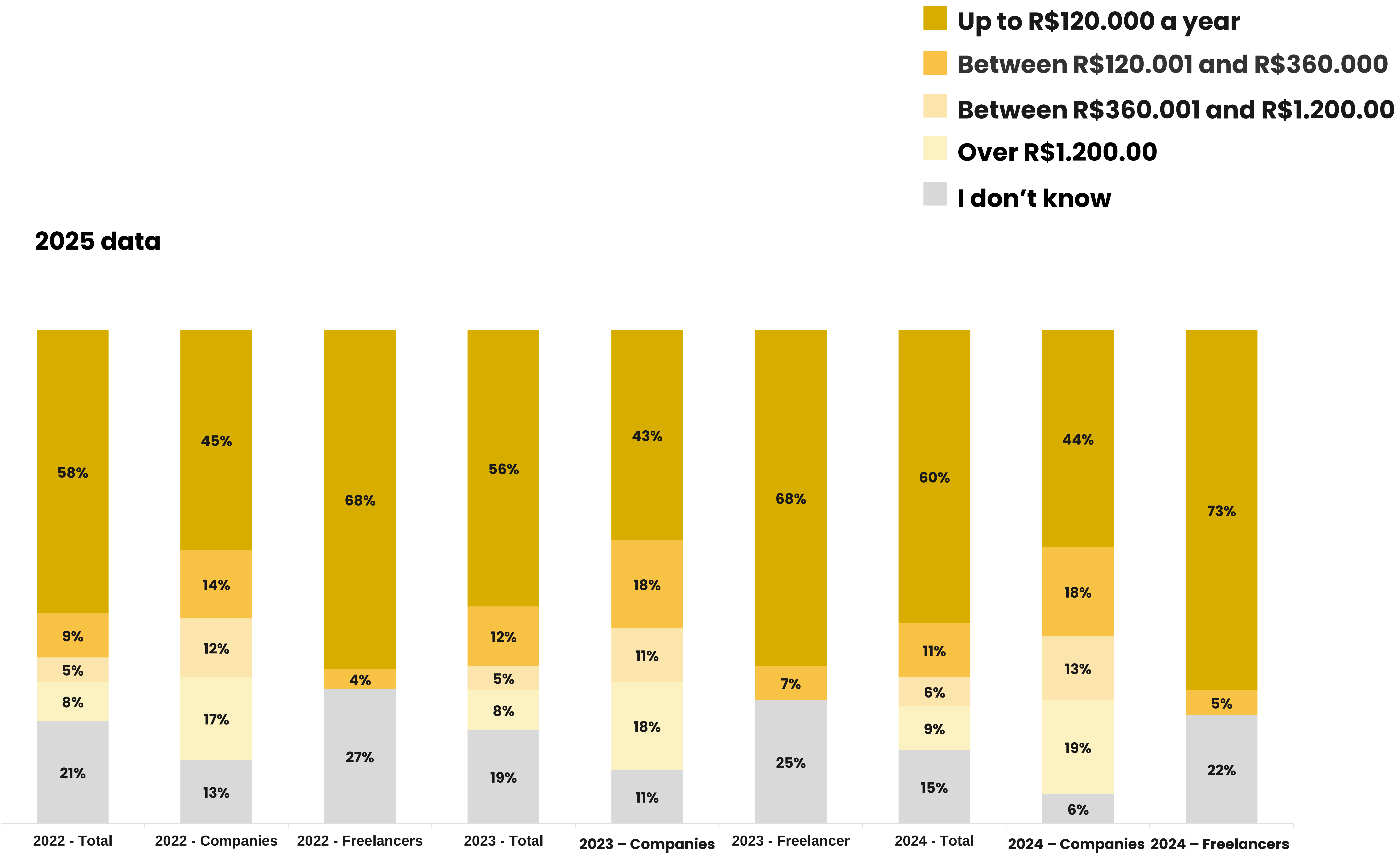
Volume of expenses

Cost allocation

Investment

Need for funding

Revenue
Total of respondents



Basis: total of respondents (2025: 314); companies (2025: 146); freelancers (2025: 168). Results in %.
Source: P27. What is your company/institution's annual gross revenue of the past 3 years, considering the projects/works and services that were carried out? If you are a freelancer, consider your personal revenue. (Single-answer | Prompted options)

Revenue

Total of respondents

Most freelancers (70% on the last 3 years' average) get an annual gross revenue of R$120.000,00 – which reflects a limit to individual scalability – whereas 17% of companies (in the last 3 years' average) remain in the intermediate bracket of R$120.001 – R$360.000.

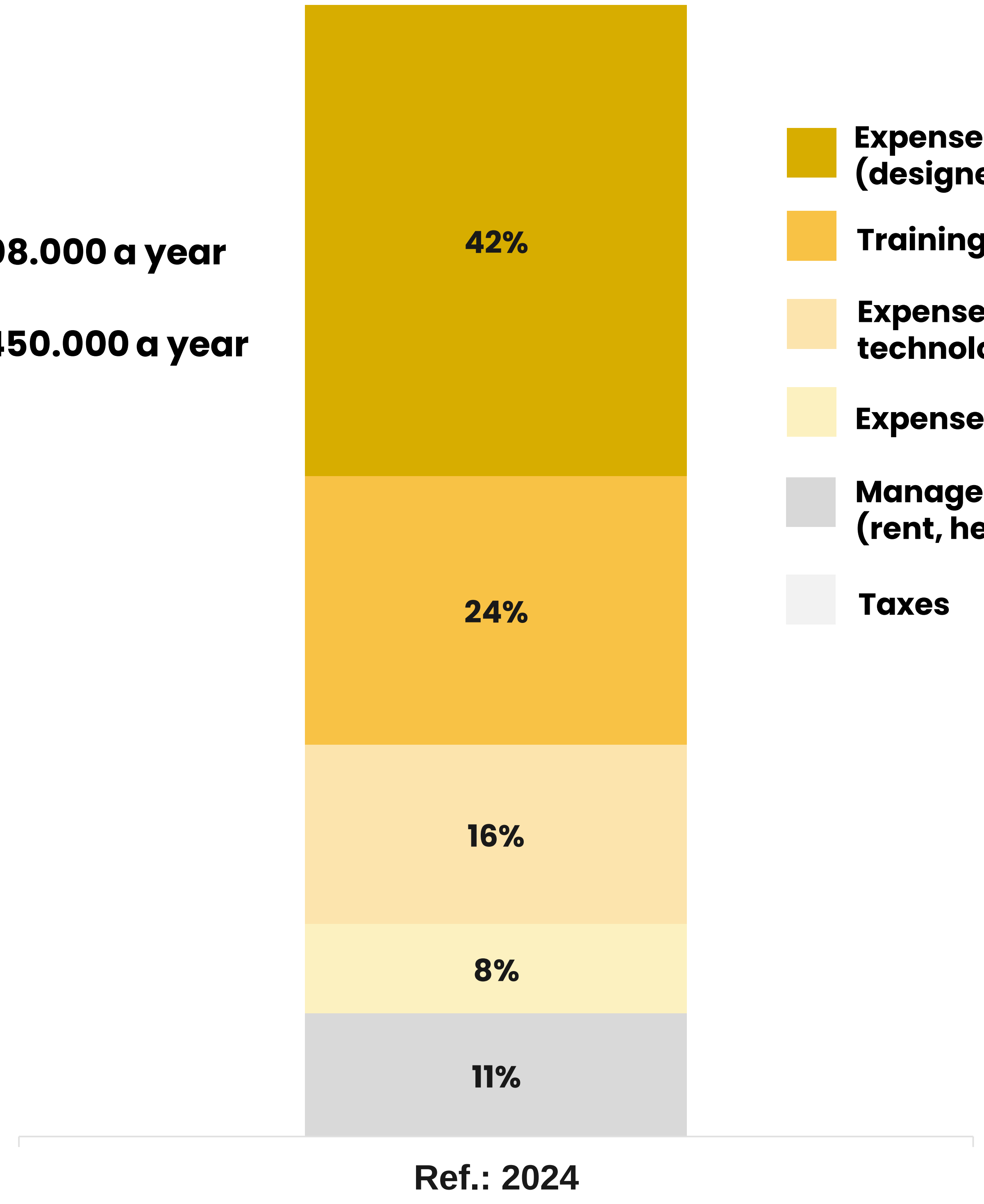
Bigger companies represent the biggest bracket of annual gross revenue above R$360.000, making up 90% of the group. Compared to more mature markets such as USA and Japan, where independent studios often reach annual revenues of over US$1 million, Brazil still faces structural challenges, such as access to funding and specialized training.

It is worth highlighting the high percentage of freelancers and companies that have claimed not knowing how much they earn in a year, in the aforementioned years.

Cost allocation
Companies

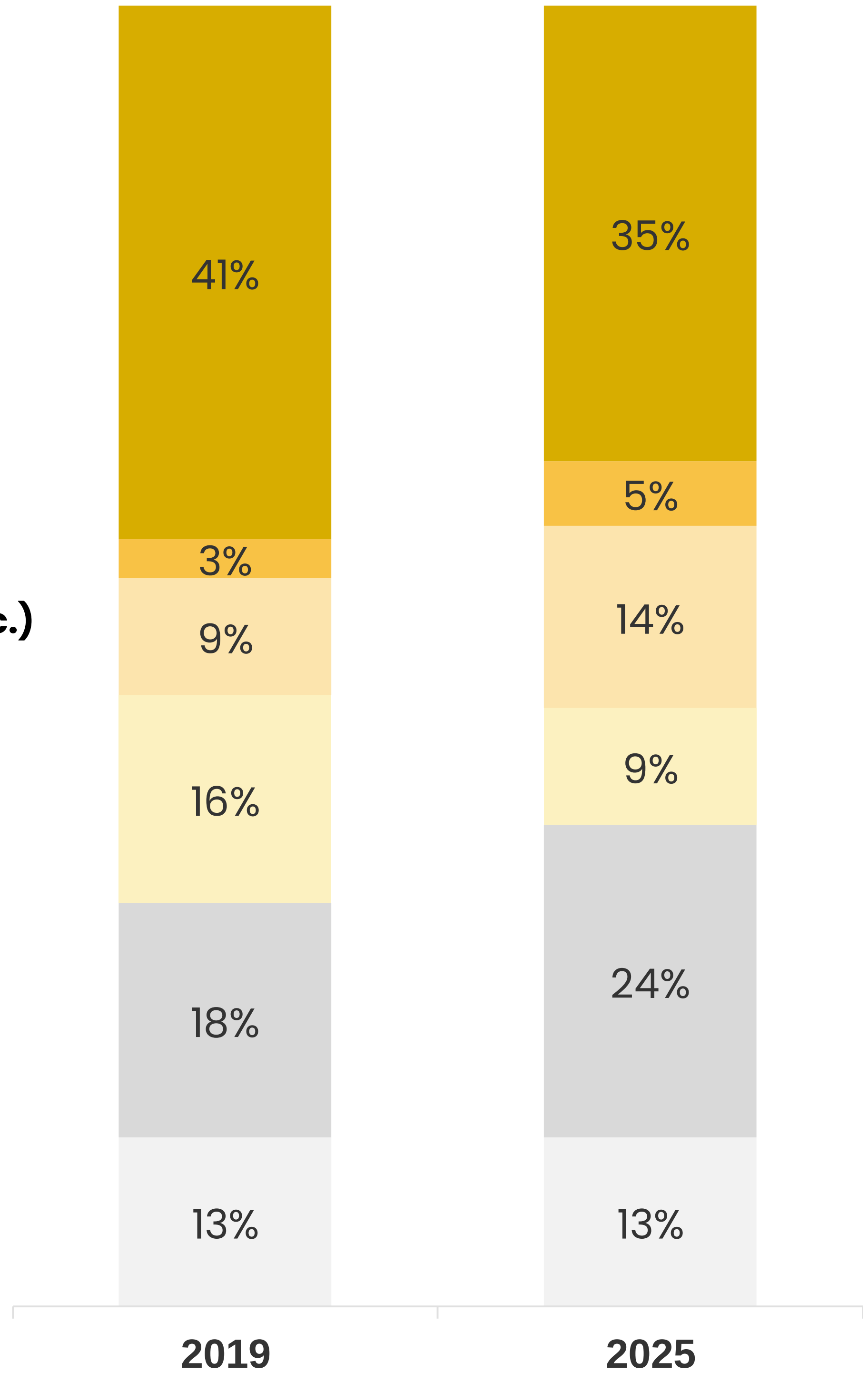
Volume of expenses

- Up to R$36.000 a year
- Between R$36.000 and R$108.000 a year
- Between R$108.000 and R$450.000 a year
- Over R$450.000 a year
- I don't know



Cost Allocation
Average percentage by type of expense

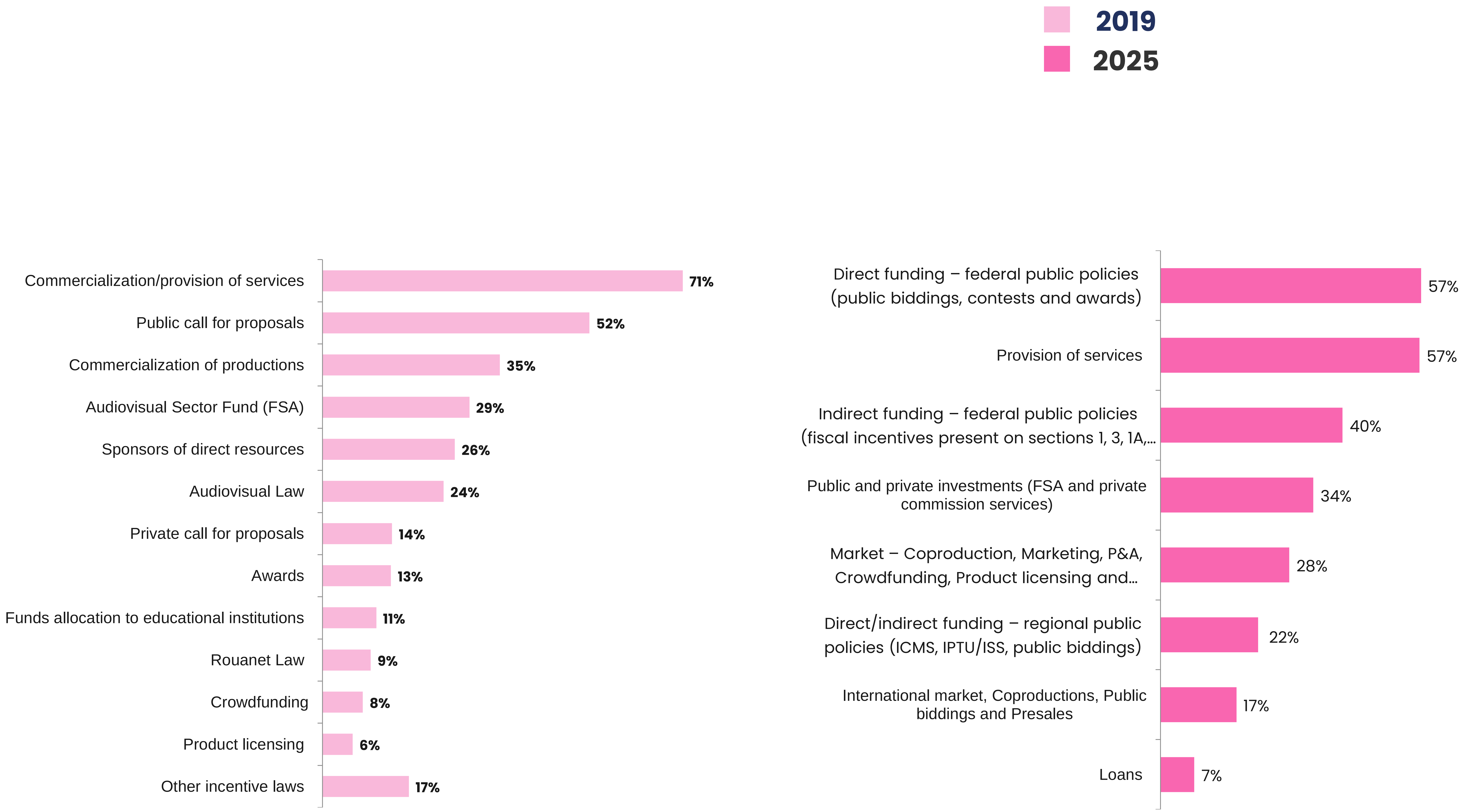
- Expenses on the technical-artistic team (designers, animators, composers etc.)
- Training and events
- Expenses on equipment, software and technology in general
- Expenses on professionals in other areas
- Management expenses (rent, headquarters costs, maintenance etc.)
- Taxes



Basis: companies (2019[VG12.1]: 134)
Source: What are the average operational costs of your company/institution in a month? Operational costs are the total amount of expenses to keep a business running. They represent fixed and variable expenses such as: Water, Electricity, Internet, Employees, Phone, Commercial Management Systems etc.
(Single-answer | Unprompted answers)

Basis: companies (2019: 179 | 2025: 137)
Source: P26. P29. Considering all costs throughout the month, what percentage does each item represent?
Attention: Percentage sum must be equal to 100%
(Single-answer | Unprompted answers)

Revenue sources
Total of respondents



Basis: total of respondents (2019: 455 | 2025: 280).
Source: P29. P31. With which sources of revenue does your company/institution/do you operate? Check the most used (in terms of volume).

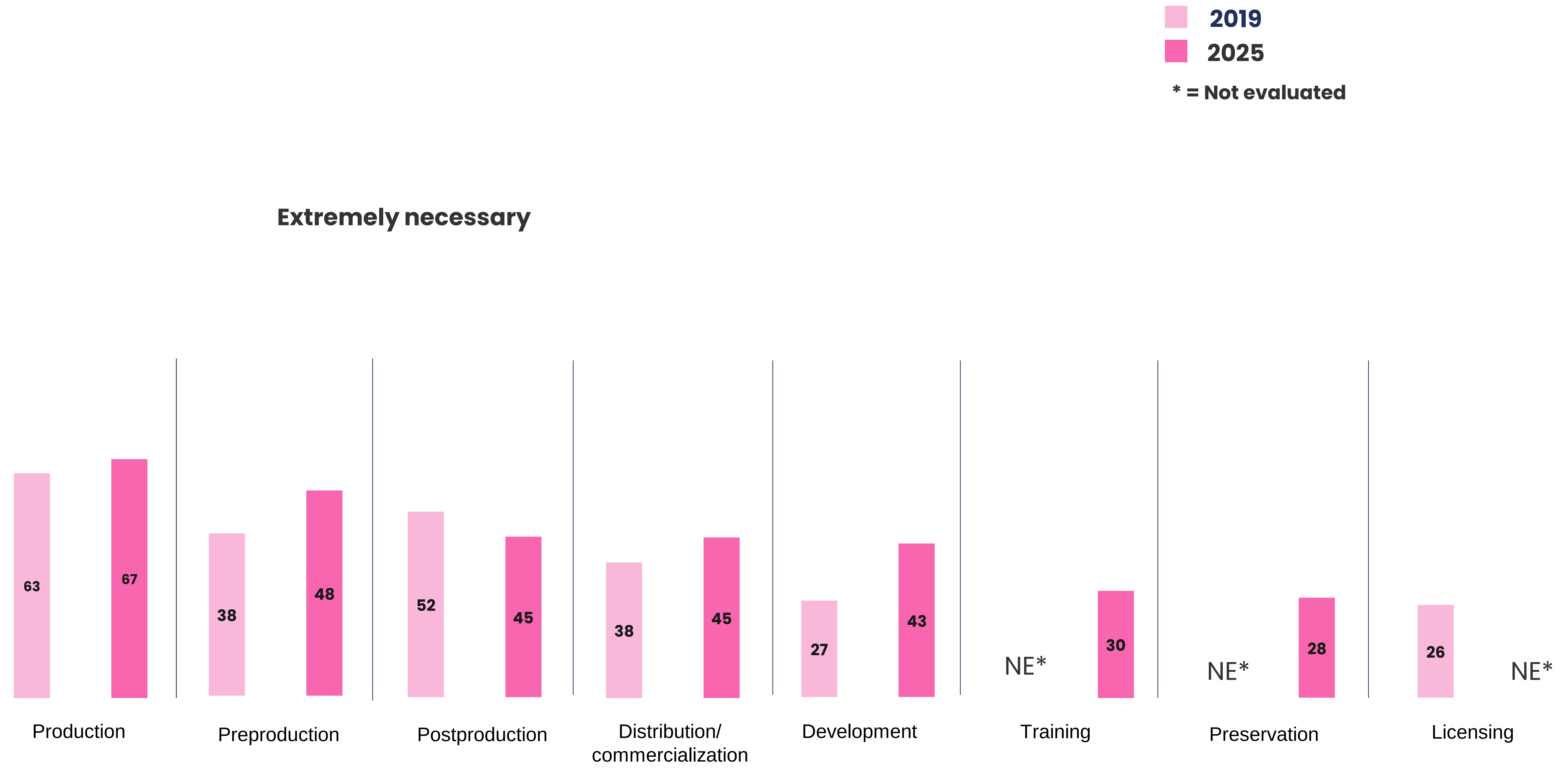
Revenue sources
Total of respondents

The predominant sources of revenue are the Provision of Services (71% in 2019 x 57% in 2025) and Direct and Indirect Federal Funding, showing significant dependence on resources coming from public policies.

Regarding the size of companies, bigger ones make use of public and private investments (FSA and private commission services) the most, while smaller ones resort to the provision of services.

The sector's sustainability still strongly depends on public funding and sponsorships; however, there may be signs of diversification with the provision of services and direct commercialization.
The quest for resources from national and international markets deserves to be encouraged, to increase resilience in scenarios of less governmental incentives.

Need for funding
Total of respondents



Basis: total of respondents (2019: 442 | 2025: 280). Results in %.
Source: P28. P30. Rank the need for external funding (incentive laws, public calls, fundings etc.) to each step in a project/work pipeline. (Single-answer per item | Prompted options)

5.6 Management and governance

Analysis and diagnosis

Market evaluation
Retrospective
Prospective

Diagnosis of animation’s limiting factors

Planning and action

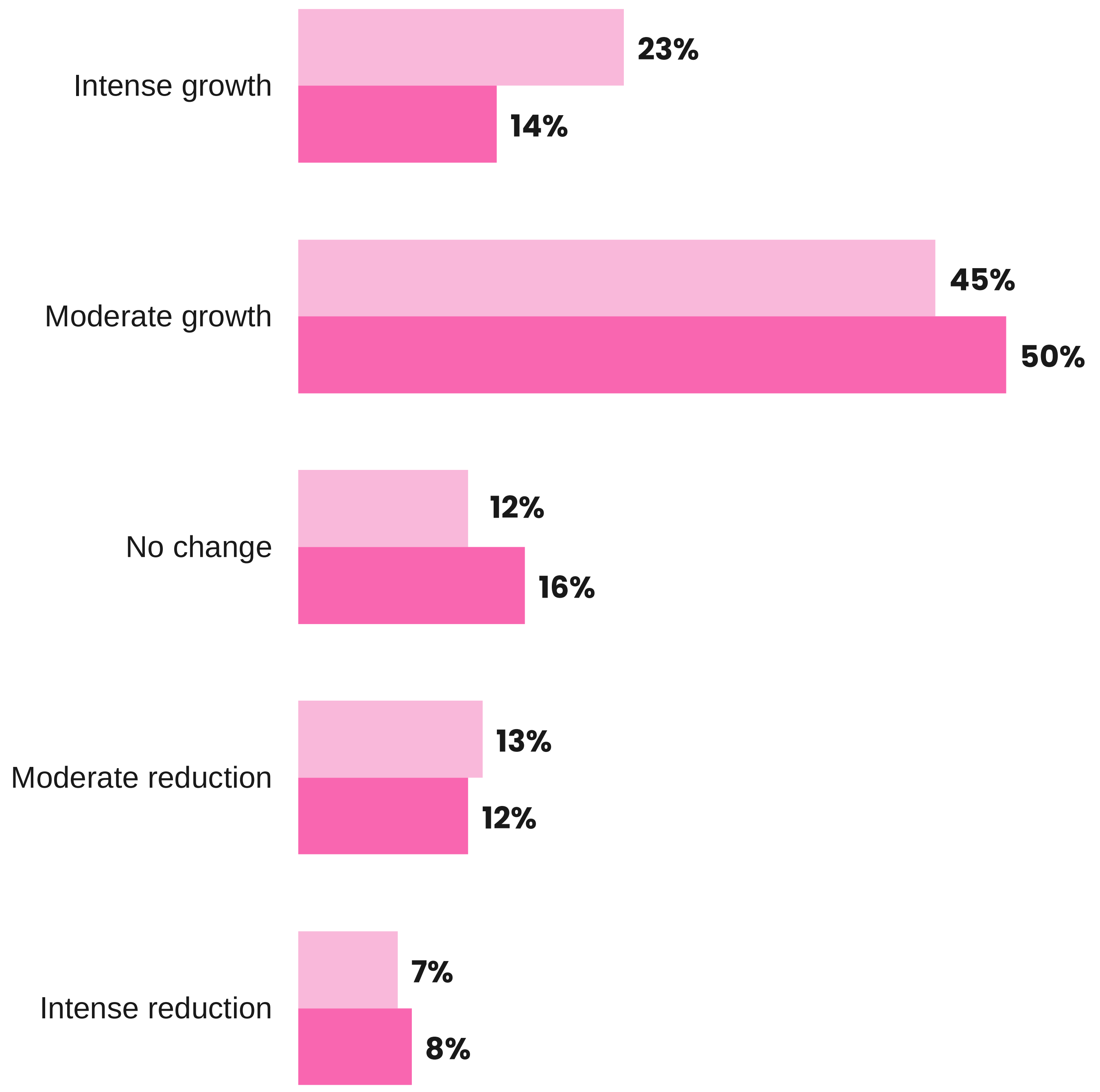
Strategic activities for management

Perspectives about activity and market growth

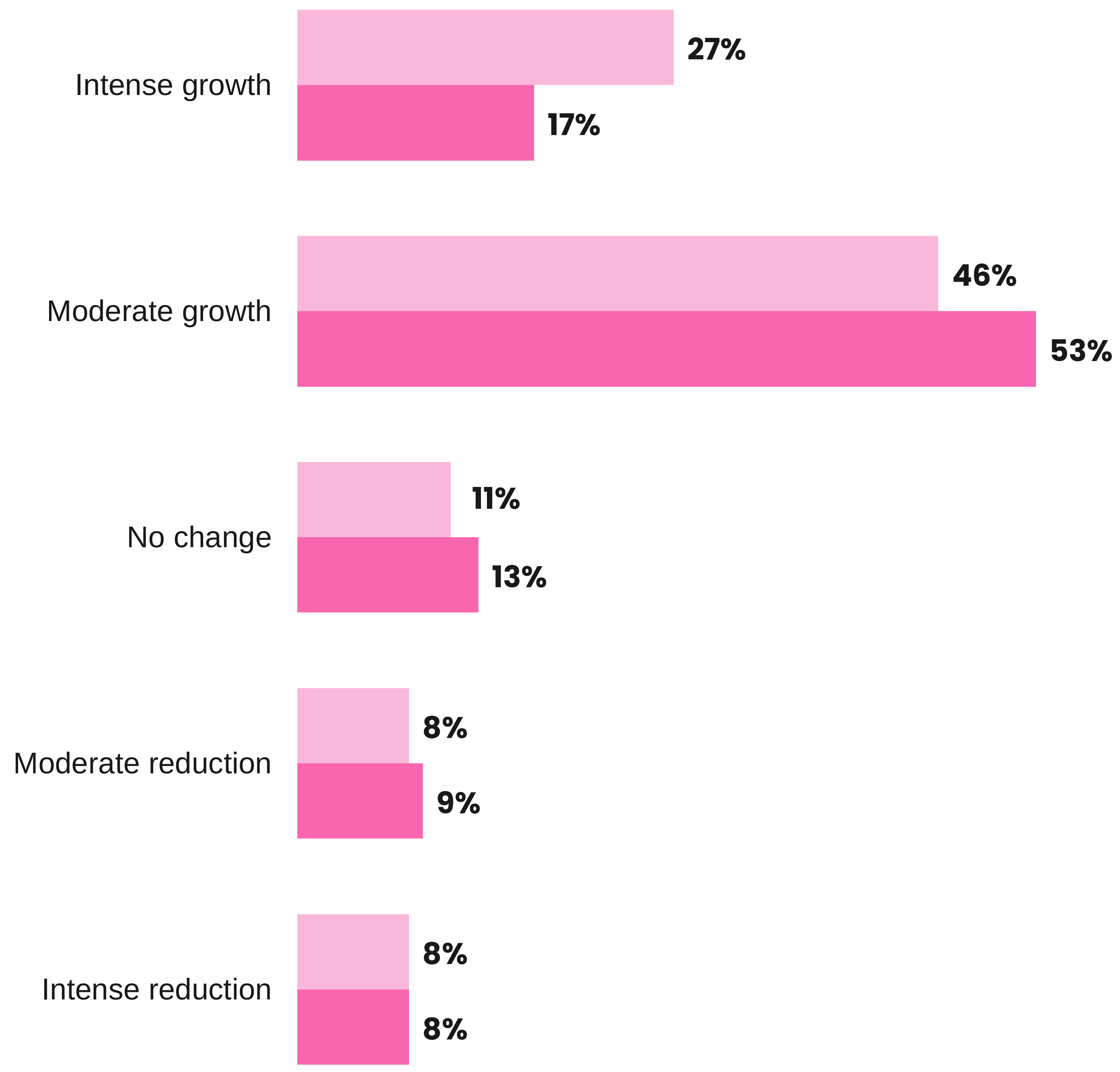
Total of respondents

2019
2025

Retrospective evaluation
Last 5 years



Prospective evaluation
Forecast for the next 3 years



Basis: total of respondents (2019: 437 | 2025: 252)
Source: P43. P45. How do you assess your company/institution growth in the industry? If you are a freelancer, how do you assess your own growth in the industry?
(Single-answer per item | Prompted options)

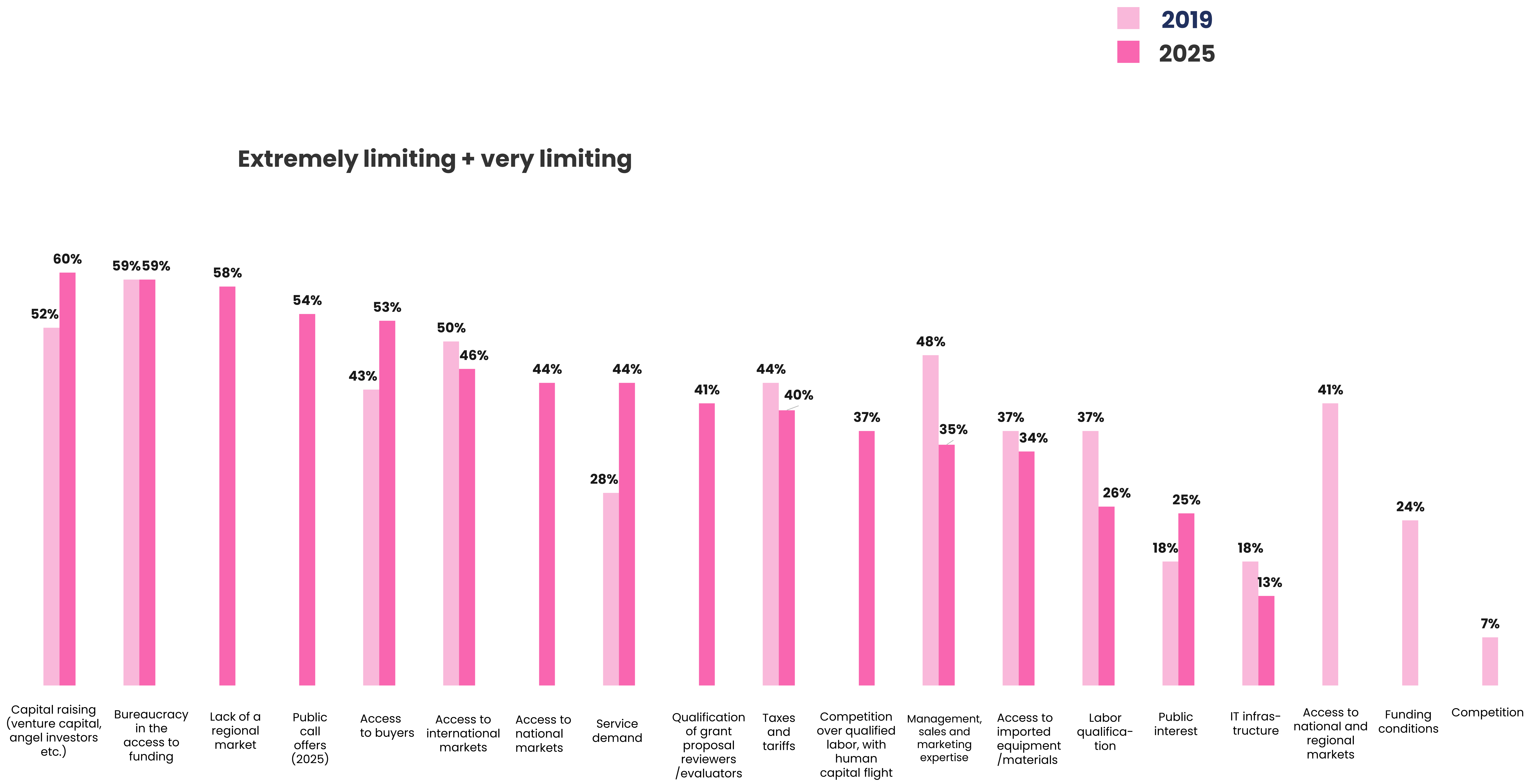
Perspectives about activity and market growth

Total of respondents

Concerning the assessment about activity growth (in the last 5 years), there's been a significant decrease in respondents who claimed to have intense growth during the 2019-2025 period (from 23% to 14%). Similarly, regarding predictions of intense growth, we observed more pessimistic opinions in the 2019-2025 period, with expectations decreasing from 27% to 17% to the following 3 years. That stems from challenges related to resource funding and its frequency, and adapting to new market demands.

Considering company sizes, bigger and more experienced companies are more optimistic about future growth. On the other hand, freelancers face more uncertainty (23% predict reduction in the next 3 year, as opposed to 10% of companies).

Limiting factors in animation
Total of respondents



Basis: total of respondents (2019: 442 | 2025: 258). Results in %.
Source: P41. P43. At which capacity are the following factors limiting to market growth?
(Single-answer per item | Prompted options)

Limiting factors in animation
Total of respondents

Among the main challenges faced by companies, which stump growth, we can point out:

Capital raising (venture capital, angel investors etc.)
60% of respondents consider it “extremely limiting” or “very limiting”.

Bureaucracy
Considered “extremely limiting” or “very limiting” by 59% of companies.

Lack of regional markets
(58%): Smaller-scale companies are specially affected.

Public call offers
(54%): Bigger-scale companies feel more impact.

Access to buyers
(43% in 2019 x 53% in 2025) and service demand (28% in 2029 x 44% in 2025): the situation notably worsened in the 2019-2025 period.

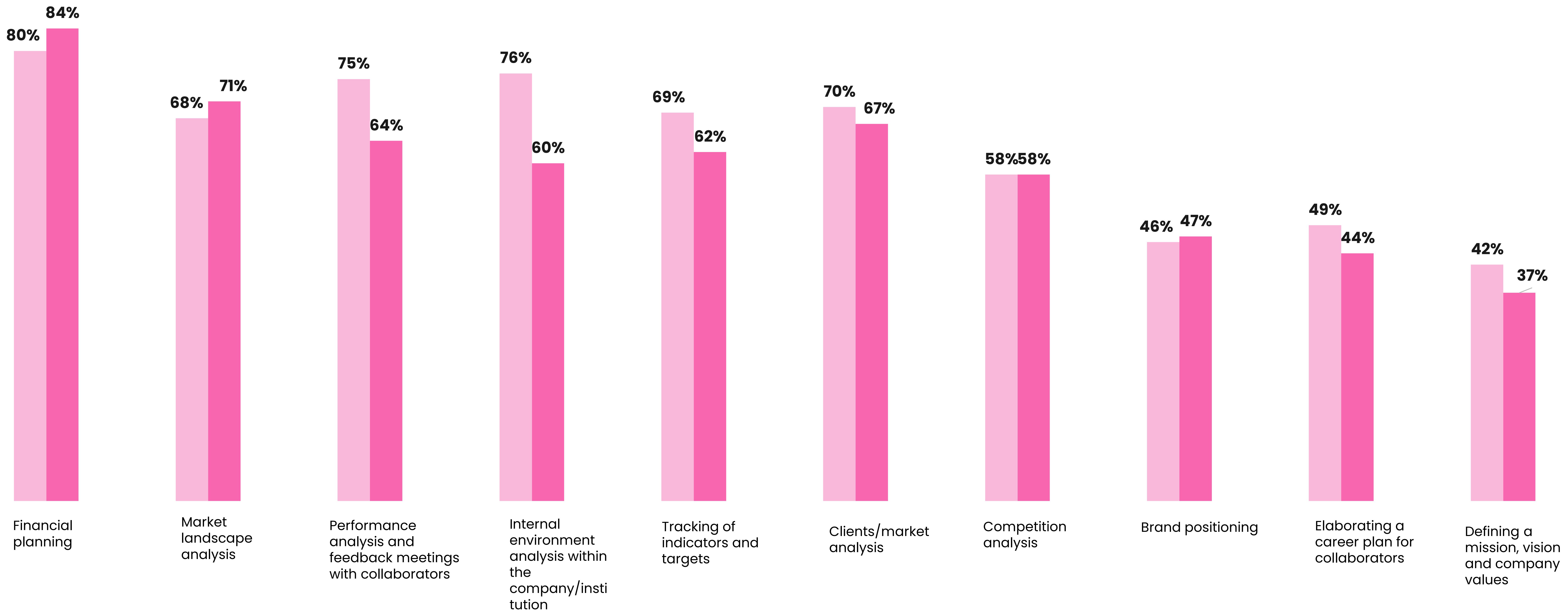
Management, sales and marketing expertise
(48% in 2019 x 35% in 2025)

Labor qualification
(40% claimed it not to be limiting/a little limiting): There was significant improvement in the 2019-2025 period, suggesting better availability of technical and management training.

Strategic management activities
Companies

2019
2025

At least **once every 2 years**



Basis: companies (2019: 179 | 2025: 110). Results in %.
Source: P42. P44. Considering your company/institution's management, how often are the following activities carried out?
(Single-answer per item | Prompted options)

.

Strategic management activities
Companies

The most mentioned key activities, “financial planning” (84%) and “market landscape analysis” (71%) happen at least once every 2 years, which shows consistent effort by most respondents, while 22% claim never doing “market landscape analysis”.

We can observe an important correlation between company size and time in operation in their strategic management activities:

1. Bigger companies are more prone to carry out these activities regularly. When it comes to financial planning, 90% of big revenue companies (R$600k+) perform it every 2 years, while only 76% of companies with up to R$120k in revenue do the same;

2. Market landscape analysis: more experienced companies (the ones which have existed longer) are more likely to frequently perform analysis, while younger companies (less than 5 years) struggle to prioritize the task;

3. The tracking of indicators and targets follows a similar pattern, being executed by 58% of companies with intermediate revenue (R$120k-360k), and by 79% of big-revenue ones (R$600k+), contrasting with 51% of companies with a revenue of up to R$120k, while 32% of companies stated they have never done it;

4. In client/market analysis, 76% of companies with a larger financial capacity (R$600k+) show bigger commitment to client analysis, as opposed to 25% of companies that deny ever performing such a task (in their majority, younger companies and smaller financial capacity);

5. We can observe that 79% of bigger revenue companies (R$600k+) carry out internal environment analysis, while only 46% of smaller revenue companies (up to R$120k) perform it, and 30% of companies stated they have never done it;

6. Less common strategic activities, such as career planning, show significant gaps in companies of all sizes. Among the smaller ones (up to R$120k), 57% do not perform it, while 37% of bigger companies (R$600k+) also neglect it;

7. Concerning competition analysis: 58% of companies carry them out frequently, while 29% stated they have never done it.

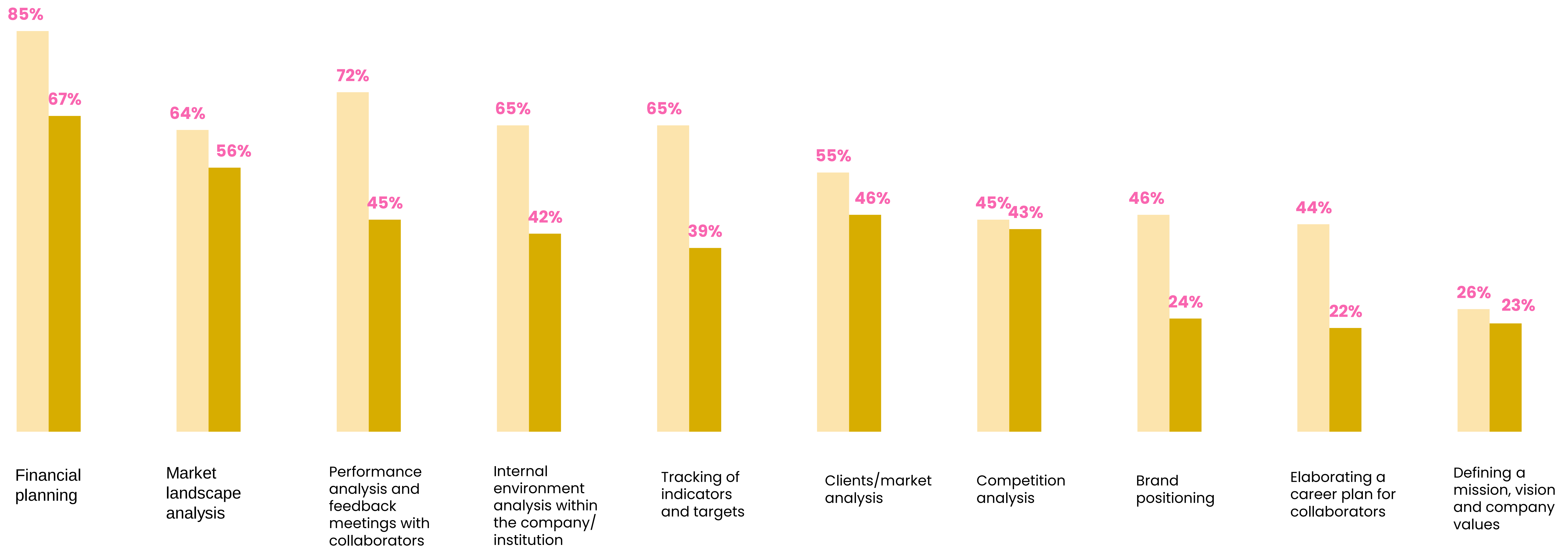
Strategic management activities

Companies

Exporting companies carry out strategic management activities more expressively than non-exporting ones, indicating that focusing on the international market encourages more advanced strategic practices.

2025
Exports
Doesn´t export

At least **once a year**



Basis: companies (2025: 110). Results in %.Source: P44. Considering your company/institution's management, how often are the following activities carried out?(Single-answer per item | Prompted options)
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Contacts

2nd Mapping of
ANIMATION IN BRAZIL

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O MENINO E O MUNDO (Boy and The World) [Feature film]. Director: Alê Abrey. Production: Filme de Papel. São Paulo, 2013.

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