film and media

CAPE TOWN
& WESTERN CAPE
FILM & MEDIA PROMOTION
a division of WESGRO

2016/2017

Executive summary

This sector fact sheet provides key trade and investment related statistics for the film sector. Specifically, it shows global trade and investment flows including an analysis of top markets and products for South Africa and the Western Cape highlighting the largest and fastest growing products and sub-sectors. The key highlights in the film sector are provided below:

Sector

- The global film industry revenue is expected to grow by an average annual growth rate of 4.5% from USD90.9bn in 2014 to USD110.1bn in 2018.
- The United States and Canada combined represent the largest markets for box office revenue valued at USD10.4bn.
- In 2015, South Africa's box office revenues increased by 36% reaching ZAR1,198m from ZAR880m in 2014.
- South Africa's revenue from motion picture, video and TV production is expected to grow by 3.3% from USD977m in 2012 to USD1.2bn in 2018.
- A total of 22 local films were released in South Africa in 2015 with a box office earning of ZAR69.2m which accounts for 6% of gross box office.
- With 22 theatrical productions released in South Africa in 2015, local films gross value had a prominent rise of 25% from ZAR55m in 2014 to ZAR69m.
- Afrikaans language films continue to do well at the South African box office claiming 65% of local box office revenues (ZAR45m).
- South Africa's games industry generated ZAR53m in revenue in 2014, an increase of 82% from 2013.
- The total turnover for all commercial productions in South Africa in 2012/2013 was ZAR1089.4m. Cape Town generated ZAR731m turnover, while Johannesburg companies generated ZAR351m.
- The Western Cape remains the most preferred location for film shooting in terms of co-production projects from 2010 to 2014.
- Animation studios in the Western Cape are the largest producers of animation on the African continent.
- Western Cape accounted for over 25% of all film projects in South Africa in 2012.
- The Cape Town Film Studio situated in the Western Cape has been rated as one of the top 10 studios globally.

Trade

- Global exports of all film sector goods increased by 14% in 2014 to reach ZAR3.9trn from ZAR3.4trn in 2013.
- South Africa's exports of film products grew by 48% in 2014 to reach ZAR6.2bn, while imports increased by 1.3% in 2014 to reach ZAR17.8bn in 2014.
- The Western Cape's exports of film products increased by 95% in 2014.
- The United States was the largest global export market for Western Cape film and television products in 2014 valued at ZAR187m in 2014.
- The top exports of cinematographic and television related goods from the Western Cape in 2014 were parts suitable for use solely or principally with the apparatus (ZAR321m).

Investment

- Between January 2003 and June 2015 a total of 2,361 FDI projects were recorded into the global film sector, representing a total capital investment of ZAR579.57bn.
- South Africa received investments worth ZAR2.3bn into its film sector from 2003 to June 2015.
- The top province attracting FDI projects was Gauteng, attracting seven projects in the audio and video equipment sub-sector, followed by the Western Cape.
- South African companies initiated 7 investment projects into the global film sector worth ZAR198m from 2003 to June 2015.

Credit Cape Town Film Studio

Table of Contents

1. Sector Description

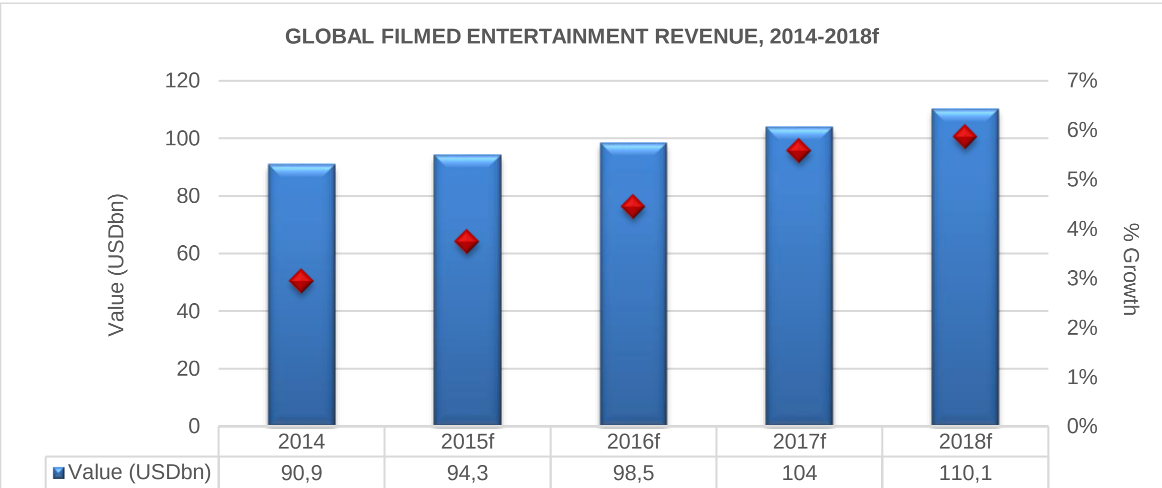
The film sector can be defined as film production, documentary production, TV, commercials, stills photography, as well as contemporary new media platforms, such as animation and gaming. The film sector can be broken down into fairly distinct sub-sectors, including stills production, commercials production, longform production, animation, gaming, and content for new media platforms. Within the stills, commercials, and longform sub-sectors, the industry can be further broken down to include catalogue, fashion, advertising and marketing materials, visual art, libraries and stop frame animation.

Film or commercial production can be location-based or manufacturing-based. When location-based, the film crew travel to different locations to produce the film. Manufacturing-based production takes place on an artificially produced film set such as the Cape Town Film Studios. Both types of film production take place in South Africa. The animation market can be segmented into sub-categories such as e-learning, web design, movies, visual effects as well as short and long-form television and film productions.

The film sub-sector generally falls into the creative industries sector. This sector, is defined as those industries which produce tangible or intangible artistic form television and film productions. The gaming sector consists of activities for PC games, mobile games, console games and online games. The film rental industry rents and leases equipment such as cameras, lighting and grip equipment, sound equipment and infrastructure such as stage platforms and creative outputs, and which have a potential for wealth creation and income generation through the exploitation of cultural assets and production of knowledge-based goods and services (both traditional and contemporary) (UNESCO, 2006).

1.1 Global Film Sector

The global film industry revenue is expected to grow by an average annual growth rate of 4.5% from USD90.9bn in 2014 to USD110.1bn in 2018. Online and mobile distribution of movies is expected to be the fastest growing sector with the growing dominance of the internet experience, overall content consumption and increasing broadband penetration. By 2018, it is expected that global electronic home video revenue will exceed physical home video revenue (sale and rental of DVDs and Blu-ray discs). China became the first international market to exceed USD4bn annually, with revenue growing by 34%. The United States and Canada remained the top region for moviegoers, with sales of USD10.4bn in 2014, decreasing by 5%, according to the Motion Picture Association of America as reported by Bloomberg Business (2015). The United States box office revenue can be attributed to the production of the most popular movies in Hollywood, major movie festivals, high movie tickets and adequate distribution.



	2014	2015f	2016f	2017f	2018f
Value (USDbn)	90,9	94,3	98,5	104	110,1
Growth	2,9%	3,7%	4,5%	5,6%	5,9%

Source: Statista, 2015

The key global film studios by market share are shown below.

TOP 20 LARGEST FILM STUDIOS BY MARKET SHARE, JANUARY 2016 TO MARCH 2016					
RANK	STUDIO	PARENT COMPANY	TOTAL GROSS (USDbn)	MARKET SHARE	COUNTRY
1	20th Century Fox	21st Century Fox, Fox Entertainment Group	718.6	32.40%	United States
2	Buena Vista	Disney	463.7	20.90%	United States
3	Paramount	Viacom (Paramount)	253.6	11.40%	United States
4	Universal	Comcast, NBC Universal	159.0	7.20%	United States
5	Lionsgate	Lionsgate	117.1	5.30%	United States
6	Sony / Columbia	Sony	105.8	4.80%	United States
7	Focus Features	Comcast, Universal Studios, NBC Universal, Rogue	93.4	4.20%	United States
8	Warner Bros.	Time Warner	71.8	3.20%	United States
9	Weinstein Company	Weinstein Company	51.1	2.30%	United States
10	Open Road Films	AMC Entertainment and Regal Entertainment Group	40.8	1.80%	United States
11	STX Entertainment	STX Entertainment	35.6	1.60%	United States
12	A24	A24	32.4	1.50%	United States
13	Fox Searchlight	20th Century Fox, Fox Entertainment Group	19.5	0.90%	United States
14	Gramercy	Gramercy	12.7	0.60%	Australia
15	Sony Classics	Sony Pictures Entertainment	9.7	0.40%	United States
16	IFC	AMC Networks	4.1	0.20%	United States
17	Drafthouse	Studio35 Drafthouse	3.3	0.10%	United States
18	Well Go USA	Well Go USA	2.9	0.10%	United States
19	Shorts International	Shorts International	2.8	0.10%	United States
20	China Lion	China Lion	2.0	0.10%	United States

Source: Box Office Mojo, 2016

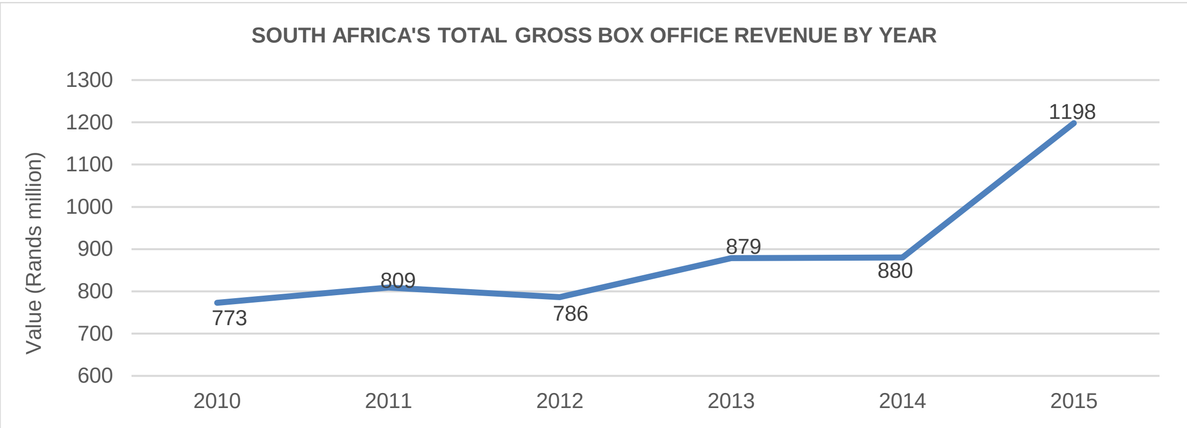
1.2 South African Film Sector

South Africa has a vibrant, growing film industry that is increasingly competitive internationally. Local and foreign filmmakers are taking advantage of the country's diverse and unique locations – as well as its low production costs. South Africa's favorable exchange rate makes it up to 40% cheaper to make a movie than in Europe or the United States and up to 20% cheaper than in Australia (South Africa Info, 2013). There are 780 cinema screens in an estimated 125 cinema complexes in South Africa, which is equivalent to 1.47 per 100,000 people. There are approximately 150 registered production companies currently active in South Africa, with about 15 of these commanding over 90% of feature films and television production (NFVF, 2013 & South Africa Info, 2013).

1.2.1 South Africa's Box Office Revenue

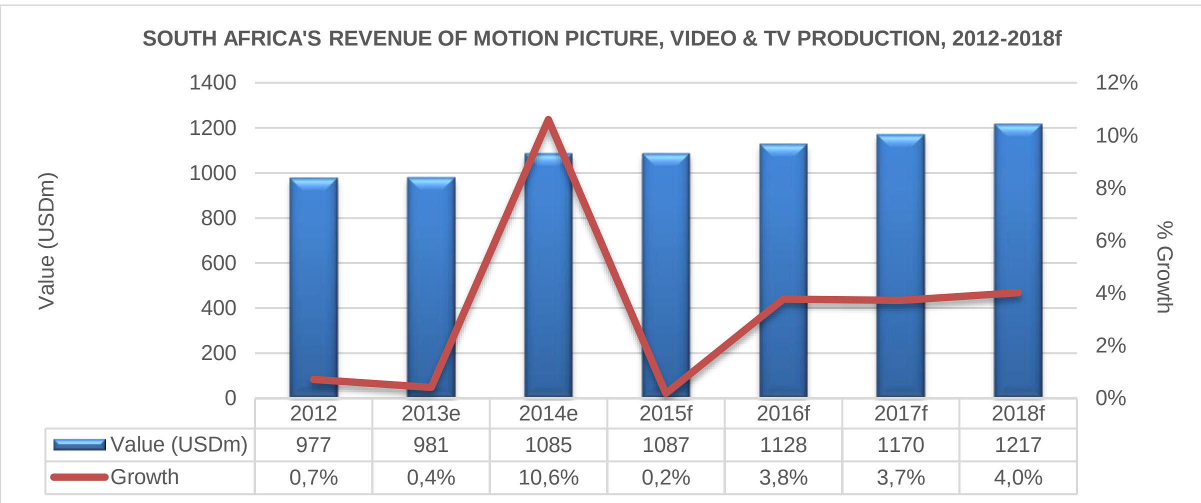
In 2015, South Africa's box office revenue (consumer spending directly related to cinema sales) increased by 36% reaching ZAR1,198m from ZAR880m in 2014. The results are for all 243 films released in South Africa (NVFV; 2015 & 2016). The sector's growth has been driven by driven by DTi rebates that have been extended until 2017, as well as increases in funding and increasing international exposure.

South Africa's film industry contributed approximately ZAR3.5bn to the total Gross Domestic Product (direct and indirect) of South Africa in 2012, growing at an annual average growth rate of 14%. The industry is ranked 50th out of 99 major industries in terms of its multiplier effect of 2.89 in South Africa, making the industry an important contributor to the South African economy (NFVF; 2015).



Source: NFVF, 2016

South Africa's revenue from motion picture, video and TV production is expected to grow by 3.3% from USD977m in 2012 to USD1.2bn in 2018 (Statista, 2016).



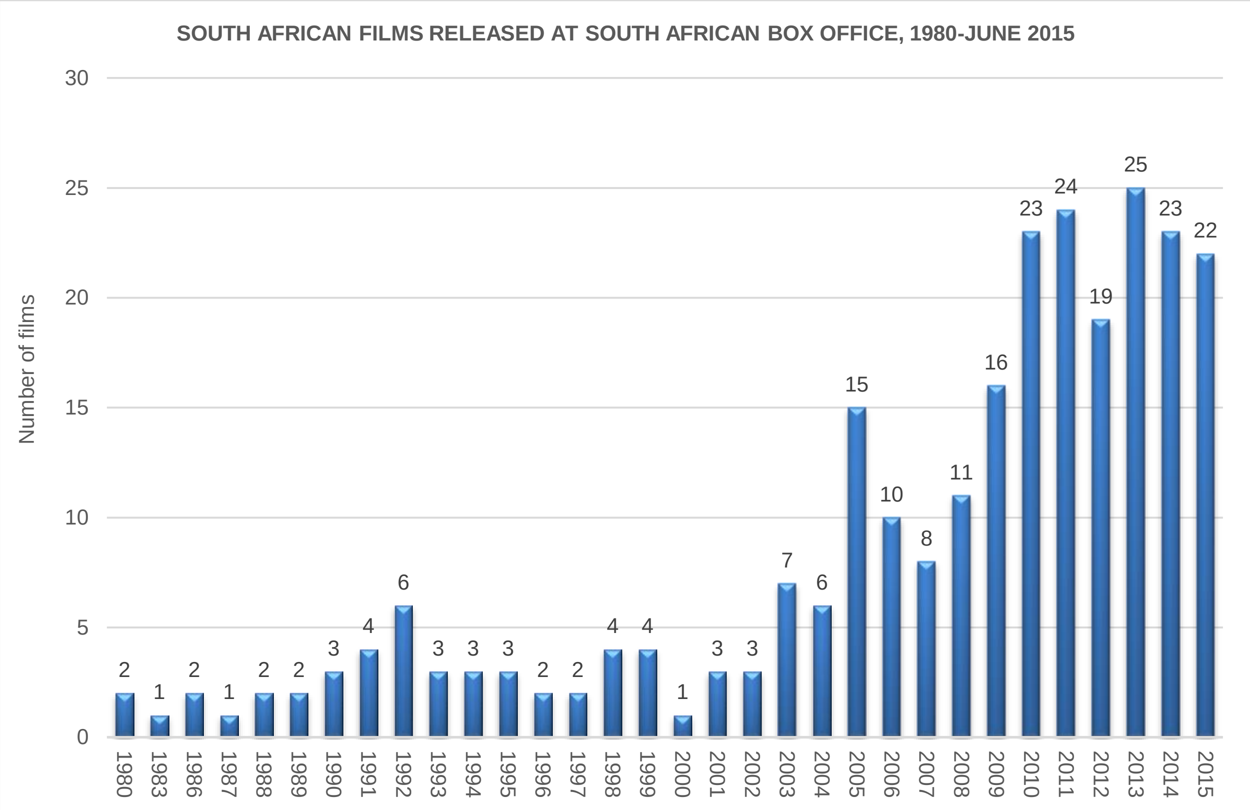
Source: Statista, 2015

1.2.2 South Africa's Local Box Office

South Africa released a total of 22 locally produced films valued at ZAR69m in 2015 and accounting for 6% of gross box office. Locally produced films performed well despite a hike in ticket prices in 2015. Of the 22 theatrical productions released in 2015, local films box office revenue increased by 25% from ZAR55m in 2014 to ZAR69m (NFVF, 2016).

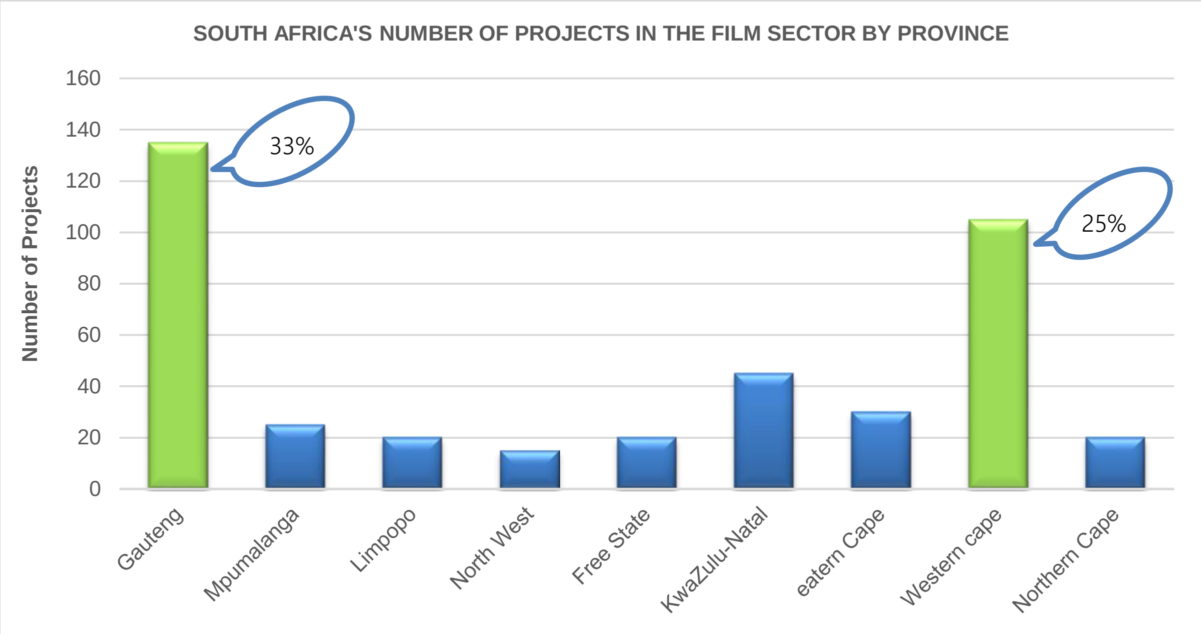
South African films released in the South African box office increased significantly from an average of 2.6 movies between 1980 and 1994 to an average of 4.6 between 1995 and 2005, before increasing to an average of 18.1 movies between 2006 and 2015. The top 3 local films that performed well at the box office were Schuks! Pay Back the Money grossing ZAR17.6m, Ballade vir 'n Enkeling grossed over ZAR9m and Mooirivier took ZAR7.2m (NFVF, 2016).

Afrikaans films were the most popular accounting for 14 titles released and taking 65% of the gross (ZAR45 million). There was only one film in Afrikaans/English which was Schuks! Pay Back the Money earning ZAR17.6 million (25%).



Source: NFVF, 2016

When examining the overall production of films among South African provinces, Gauteng and the Western Cape still dominate as the provinces of preference for the film industry, followed by KwaZulu-Natal. Gauteng and the Western Cape together account for over 50% of all film projects in South Africa.

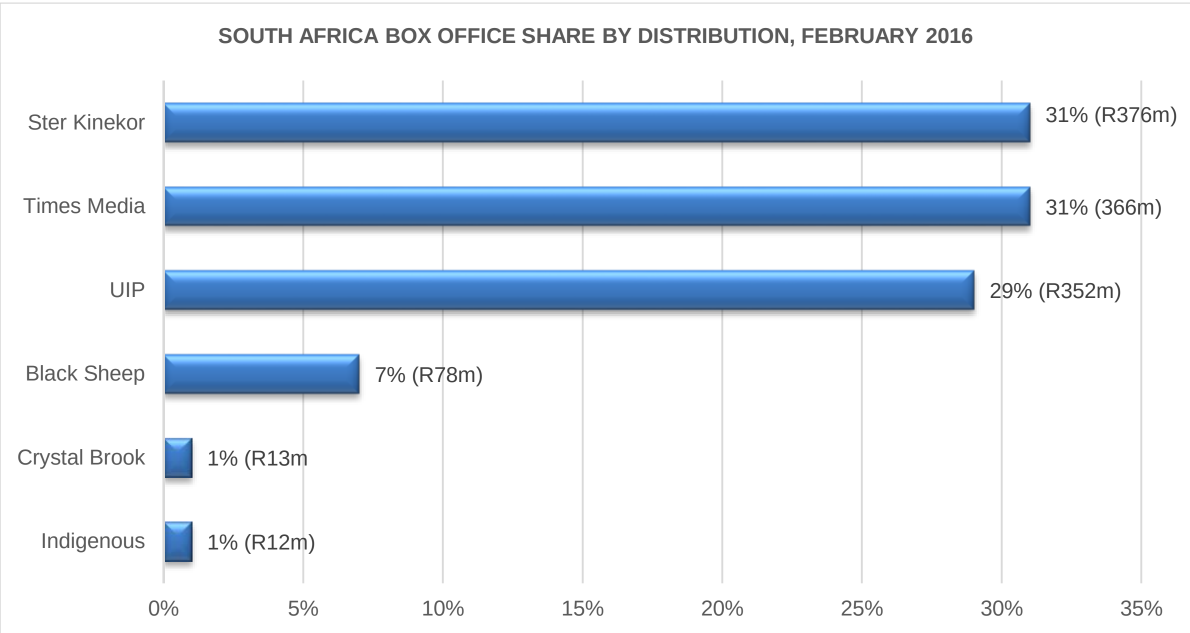


Source: NFVF, 2013

1.2.3 South Africa's Box Office Distributors

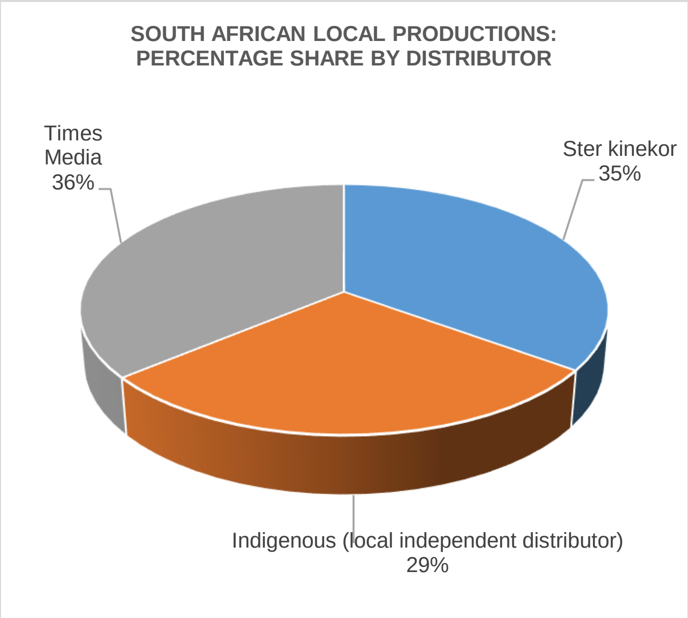
In 2014, the biggest portion of market share was generated by Times Media Distribution (TM) claiming 31% of the total box office gross. Ster Kinekor (SK) was the second highest distributor claiming 31% market share followed by UIP at 29%.

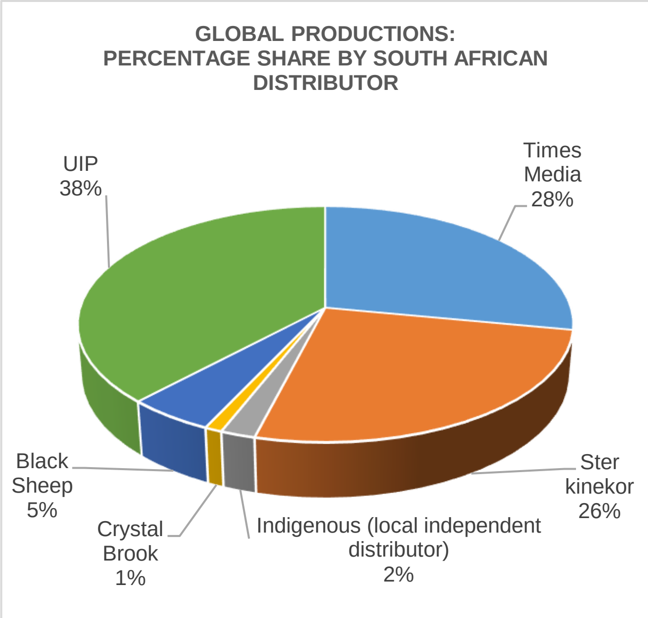
The most popular genre in South Africa with the highest earnings were action movies claiming 20% of box office gross (ZAR245m), followed by action/adventure with 17%, and animation at 17% respectively. As for local films, comedy (ZAR28m) was highest grossing genre followed by drama (ZAR22m) with 10 titles released. The United States accounting for 71% (ZAR851 million) of gross box office and South African films represented 6% (ZAR69 million) (NFVF, 2016).



Source: NFVF, 2016

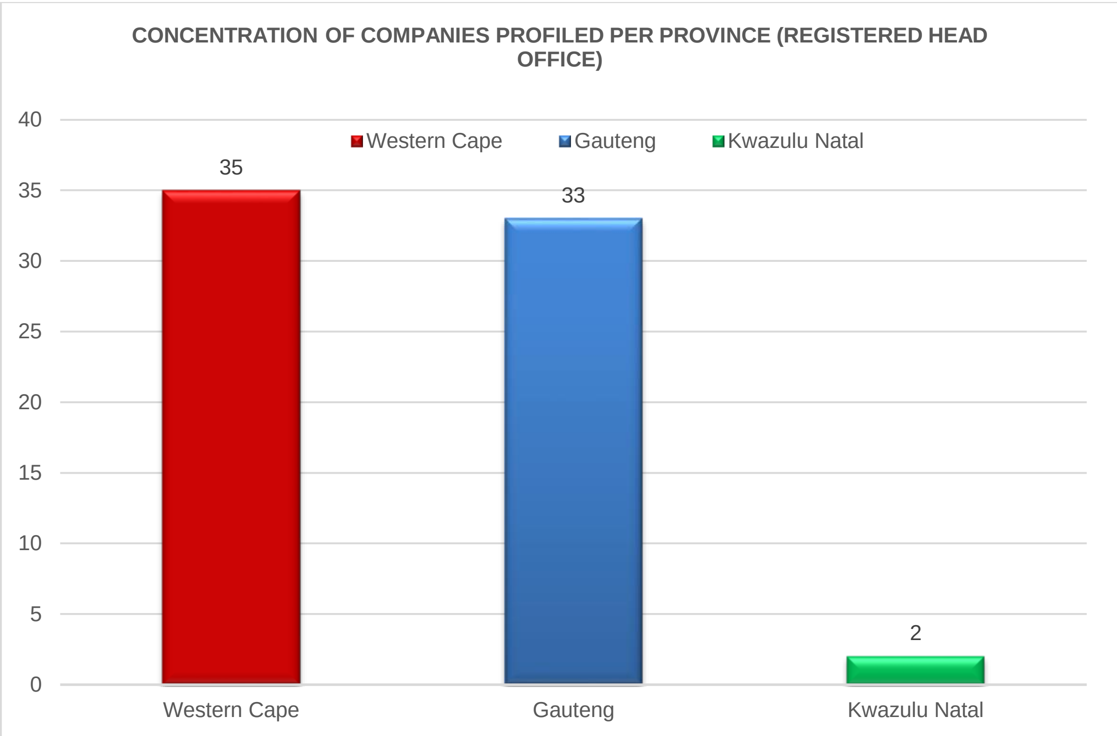
The figures below show the percentage share of gross by film distributor from South Africa. Times Media is the leading film distribution company accounting for 36% of local films. In comparison to local box office, United International Pictures (UIP) on the other hand had the highest percentage share accounting for 38%.





Source: NFVF, 2016

The figure below shows that the Western Cape has the highest concentration of companies by registered head offices in South Africa.



Source: WhoOwnsWhom, 2015

1.2.4 South Africa's Production of Commercials; Stills, Animations & Gaming

Production of Commercials

According to the Commercial Producers Association Industry Survey (2013):

- The average total turnover generated for all types of commercials in South Africa per company in 2012/2013 was ZAR24m.
- The total turnover generated for all commercial productions for the same period was ZAR1089.4m.
- Cape Town companies generated ZAR731m turnover, while Johannesburg companies generated ZAR351m in turnover in 2012/2013.
- Stills and TV Commercials make up 57.7% of the turnover of production in the Western Cape (SAASP, 2011).
- The combined value of Stills & TV Commercial Production in the Western Cape is ZAR1.53bn (SAASP, 2011).

Production of Stills Photography

Stills Production is a term that encompasses a broad range of services offered to international photographers and advertising agencies when they conduct photographic shoots on location. According to the South Africa Association of Still Producers the *Stills Industry Survey 2013/2014* the following findings were shown:

- The Stills sector contributed R 0,86 billion to South Africa's GDP (direct and indirect spend)
- The sector created 467 FTE jobs in South Africa
- The sector paid ZAR57m in direct taxes to SARS in South Africa
- The sector Delivered and economic multiplier of 2.89
- The Stills sector hosted 4015 International guests for a total of 36 135 accumulative days
- The Stills sector represents more than 70% of all filming permits issued by the City of Cape Town

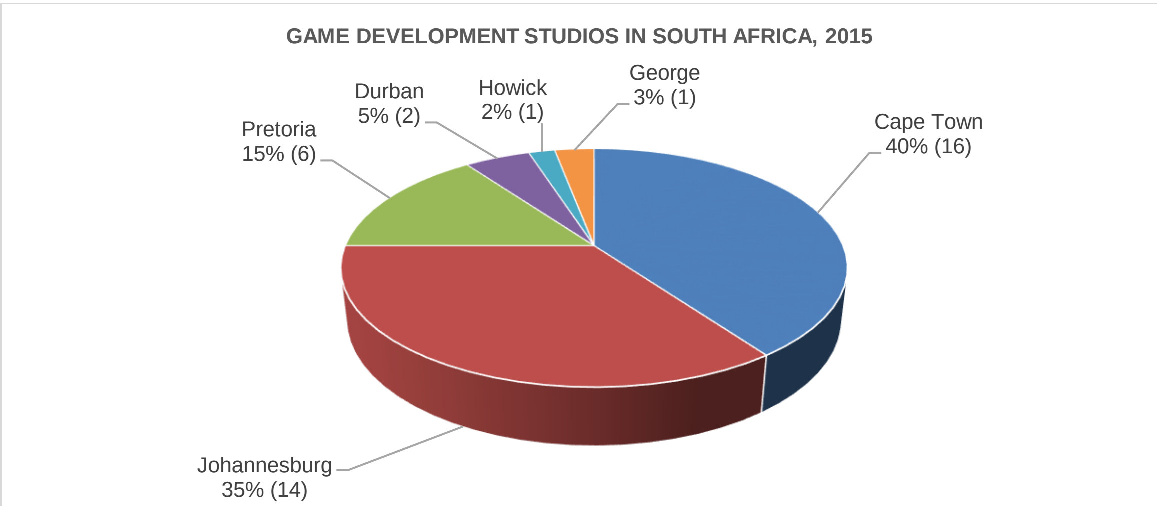
Animation

Even though the South African animation industry has shown fast growth in the past five years, it is still small compared to the industry in mature international countries. Animation studios in the Western Cape are the largest producers of animation on the African continent.

Gaming

According to Price Waterhouse Coopers' (PWC) South African Entertainment and Media Outlook 2013 – 2017 Report, the video game market generated revenues of ZAR2.2bn in 2012 fuelled by the growth in digital and mobile gaming and growing internet speeds. Games played via social media such as Facebook is another driver of the gaming market as well as multiplayer, online games.

Gaming development studios are mainly in Gauteng and the Western Cape. There are 16 gaming studios in Cape Town, 14 in Johannesburg, 6 in Pretoria, 2 in Durban, 1 in both Howick and George.



Source: Make Games South Africa, 2015

According to the Make Games South Africa (MGSA) South African Games Industry Survey 2015, the South African games industry generated ZAR53m in revenue in 2014, up from ZAR29m in 2013, an increase of 82% from the previous year. The three largest gaming studios in the industry (measured by revenue) account for 48% of the entire industry value. Overall the gaming industry had 253 jobs (full time & contract) in 2014. This is up from 240 jobs in 2013, a 5% increase. Of the 253 jobs there were 152 full time posts (up from 98 in 2013), a 55% increase and 101 part time posts (down from 142 in 2013), a 29% decrease.

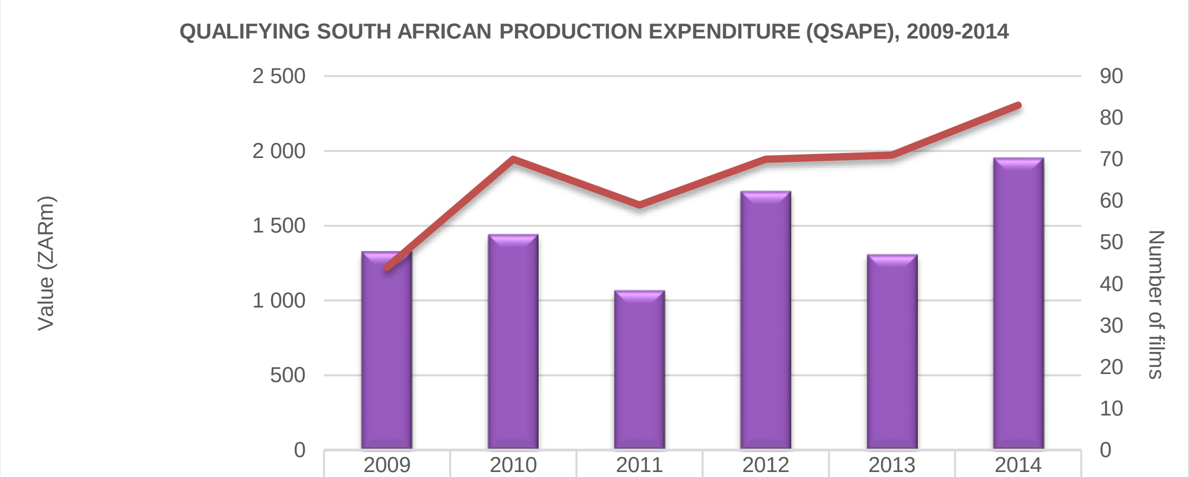
1.2.5 Drones

The global market for unmanned aerial vehicles or drones is expected to reach USD22.4bn by 2020, with military drones accounting for USD11.6bn, followed by commercial drones (USD6.4bn) and hobby drones (USD4.4bn) (Statista , 2016). Most growth in the drone industry is on the commercial/civilian side, as the shift away from the military market gains momentum, grow at a compound annual growth rate of 19% is seen for commercial/civilian drones between 2015 and 2020, compared with 5% growth on the military side. The global commercial drone market is expected to take shape around applications in a handful of industries: film production, news media, cinematography and photography, agriculture, energy, utilities, mining, construction, real estate inspection and maintenance, as well as geographic information systems (GIS). Amazon and DHL have already begun testing drone delivery, and so has Switzerland's postal service.

In July 2015, South Africa announced new rules regulating the use of remotely piloted aircraft systems (RPAS)/drones: *http://www.caa.co.za/Pages/RPAS/Remotely%20Piloted%20Aircraft%20Systems.aspx*. The first set of drone pilots in the Western Cape graduated after nearly a month of training from UAV Industries, following regulations by the Civil Aviation Authority that mandate training for drone pilots.

1.2.6 Qualifying South African Production Expenditure

According to NVFV (2015), the DTI film incentive resulted in ZAR1.952bn in Qualifying South Africa Production Expenditure (QSAPE) and this is estimated to have created 35,786 FTE jobs during the financial year ending March 2014. With an economic multiplier of 2.89, QSAPE resulting from the implementation of the DTI Film Incentive resulted in ZAR5.64bn in economic activity during the financial year.



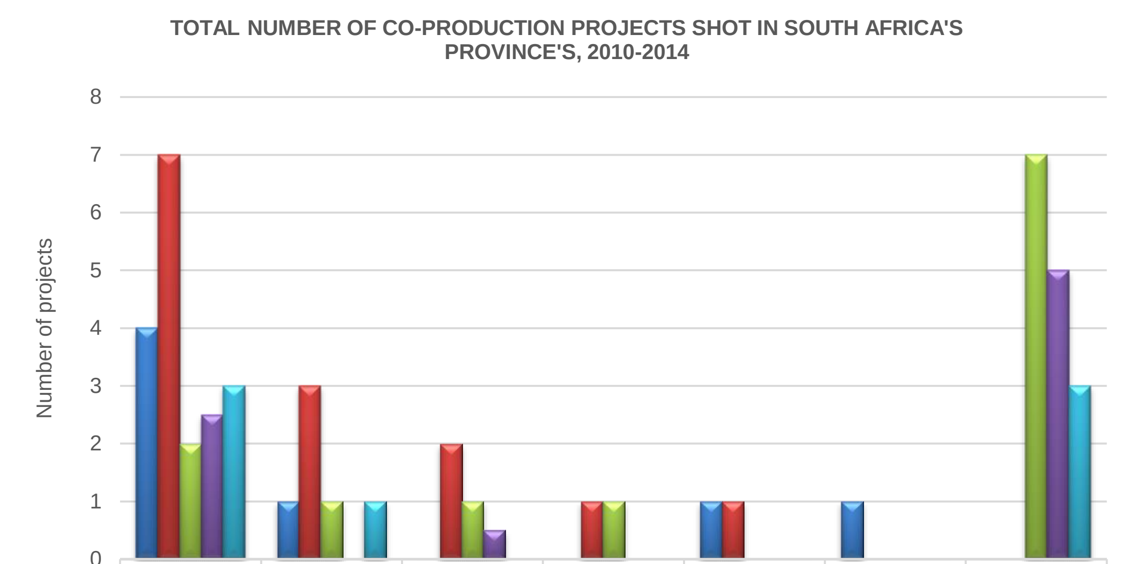
	2009	2010	2011	2012	2013	2014
Total QSAPE (ZARm)	1 328	1 442	1 066	1 731	1 306	1 952
Number of Films	44	70	59	70	71	83

Source: NFVF, 2015

1.2.7 Co-production

The figure below shows the co-production projects in South Africa from 2010 to 2014. Co-productions are based on the collaboration between two or more producers from different countries for the creation of film and television programmes. Any official co-production is regarded as a national production of each co-producing country, making it eligible for any benefits or programs of assistance available in either country. South Africa has signed co-production treaties with 9 countries: Canada, Italy, Germany, the United Kingdom, France, Australia, New Zealand, Ireland and Netherlands (NFVF, 2016).

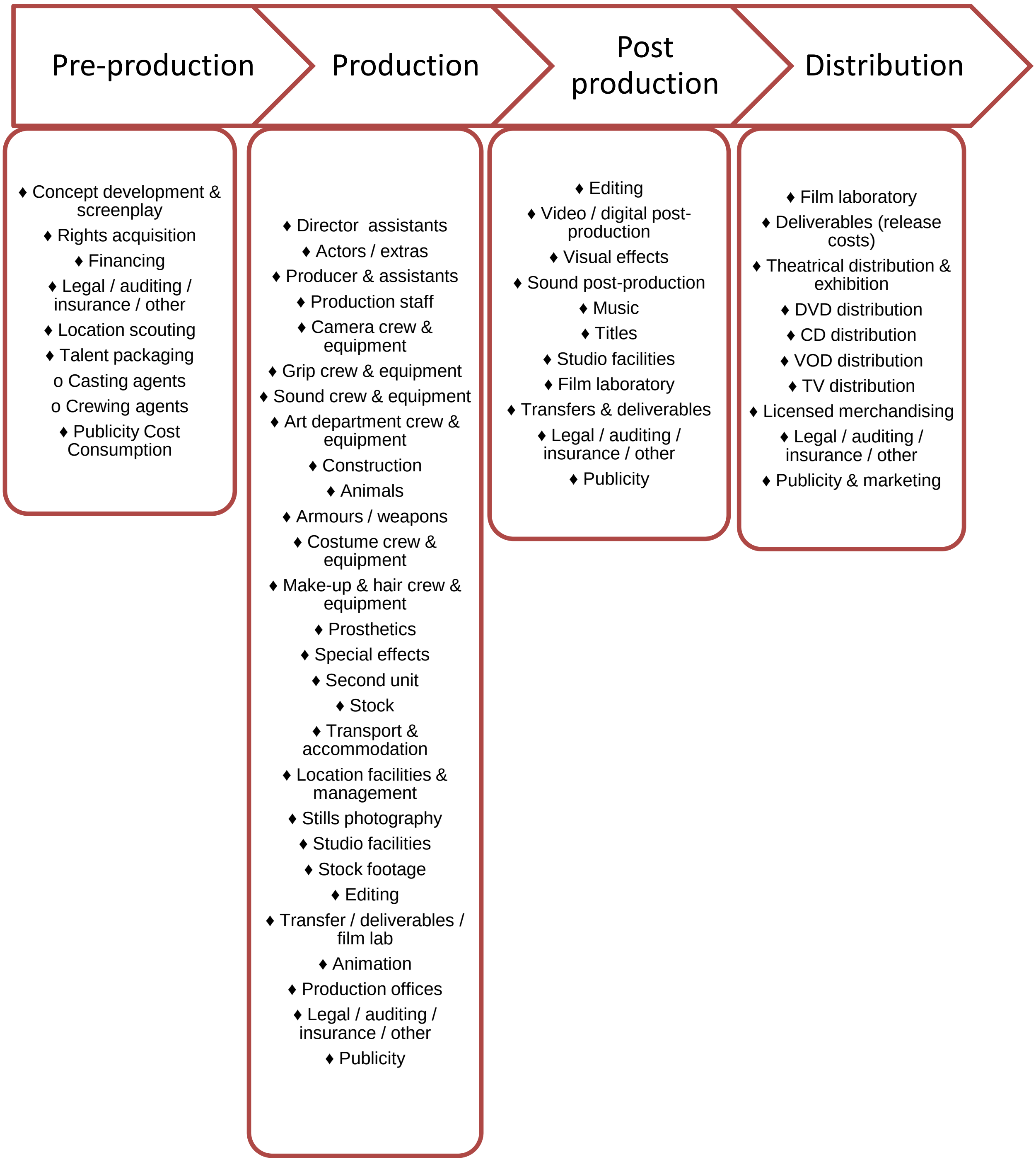
The Western Cape remains the most preferred location for film shooting in terms of co-production projects from 2010 to 2014, followed by Gauteng and KwaZulu-Natal. This indicates the attractiveness of the Western Cape as a prime location for international film producers among South African provinces.



	Western Cape	Gauteng	Kwa-Zulu Natal	Northern Cape	North West	Eastern Cape	Still to be confirmed
2010	4	1	0	0	1	1	0
2011	7	3	2	1	1	0	0
2012	2	1	1	1	0	0	7
2013	2,5	0	0,5	0	0	0	5
2014	3	1	0	0	0	0	3

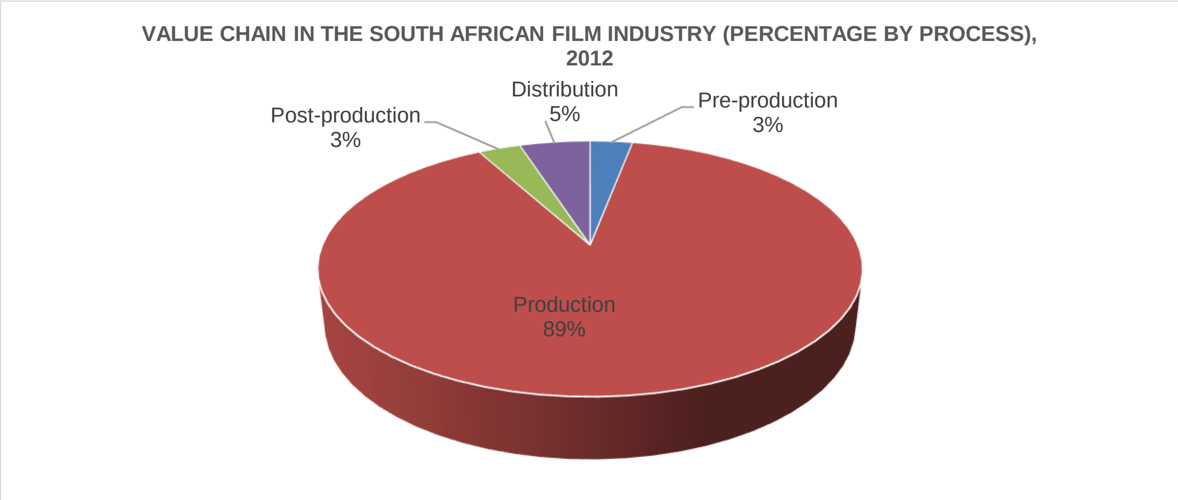
Source: NFVF, 2015

1.2.8 Film Industry Value Chain



Source: WhoOwnsWhom, 2015 & National Film and Video Foundation (NFVF) Baseline Study

The production stage of the value chain has the highest expenditure as shown in the chart below.



Source: WhoOwnsWhom, 2015 & National Film and Video Foundation (NFVF) Baseline Study

1.3 Western Cape Film Sector

Over the years there has been a growing interest by local and international film industry players in the Western Cape as a film location. As a result the Western Cape film industry has been one of the fastest growing sectors and has become a key contributor to the Western Cape economy (Invest in Western Cape, 2013). The province's film sector is envisaged to become a significant player in the international film market.

The total turnover of the Western Cape film industry was in the region of ZAR2.65bn in 2011 (NFVF, 2013). However, its wider contribution to the tourism sector as a whole has been estimated to be about ZAR23bn per annum (Western Cape Provincial Government, 2012). The Western Cape's Stills and TV Commercials is valued at ZAR1.53bn and makes up 57.7% of the turnover of production in the province (SAASP, 2011). The Western Cape provincial government has invested ZAR20m into the film industry, and the returns have been worthwhile as the industry employs more than 30,000 of the province's skilled and unskilled workers (Western Cape Business, 2013).

The City of Cape Town has seen a number of productions occurring within 20 minutes' drive from the metropolitan. Nevertheless, despite Cape Town representing the major hub for productions, other municipalities are also attracting interest from the film industry.

The Western Cape has the following key competitive advantages in the film sector:

WESTERN CAPE'S FILM SECTOR COMPETITIVE ADVANTAGE
• The province has highly competitive production cost rates when compared to major film markets. • According to FDI Benchmarking 2015, Cape Town has the lowest annual operating costs (property, labour and utility costs) in the film and TV industry when benchmarked against other film cities such as Johannesburg, New York, Madrid, Mexico, Paris, Hong Kong and London. • The Cape Town Film Studio situated in the Western Cape has been rated as one of the top 10 studios globally (Invest in Western Cape, 2013; Mail & Guardian, 2012). • The province has a variety of landscapes and locations within close proximity of the city centre, these include: ragged mountainous regions, breath taking ocean views, internationally acclaimed beaches, scenic wine farms and semi-desert areas – all within a 2 hours radius. • A number of productions have also taken place within the Cape Town CBD demonstrating the capability of Cape Town as a film centre. • The Western Cape has lengthy day light hours in summer (average of 15 hours: 5:30am to 20:00pm) • Local industry professionals are competent, experienced and technically proficient providing top quality productions. • The Western Cape and South Africa have high standards of copyright protection. • Increasing consolidation in the industry enabled larger production houses to harness economies of scale and keep production costs down. • World class infrastructure in terms of banks, telecommunications, road networks, ports are available in the Western Cape. • Numerous major international films have already been produced within the Western Cape, which garners further interest in the province as both a technically competent and aesthetically appealing location. • The Western Cape has a world class skills base, including professional and semi-professional local actors and actresses in the area of film production, as well as both pre- and post- production activities. • Additionally, film makers and famous actors/actresses have publicly voiced their enthusiasm about Cape Town as a destination for not only work but leisure. • Numerous industry festivals are and have been hosted in Cape Town, namely: CTIAF (Cape Town International Animation Festival), Encounters South Africa International Documentary Film Festival, Wavescape, Shnit short film festival and the 48 hour Film project.

Source: Invest in Western Cape, 2013; Mail & Guardian, 2012; FDI benchmark, 2016;

The Cape Town Film Studios is a ZAR500m film studio, with every level of government invested together with Videovision Entertainment and Sabido Investments. It is the first custom built Hollywood style film studio complex of its kind in Africa, with state of the art support services, including green screens and the ability to shoot 3D movies (NFVF, 2013 & Western Cape Business, 2013).

Movies filmed in Cape Town include:

- The Last Face (2016)
- Eye in the Sky (2015)
- Endless River (2015)
- The Giver (2014)
- Mandela: Long Walk to Freedom (2013)
- Dredd (2012)
- Safe House (2012)
- Dark Tide (2012)
- Chronicle (2012)
- Invictus (2009)
- Amelia (2009)
- 24: Redemption (2008)
- Blood Diamond (2006)
- The Interpretaor (2005)
- Lord of War (2005)
- Hotel Rwanda (2004)
- Ali (2001)

In addition a number of TV series including Homeland S4 (2014), Dominion (2014-2015), Of Kings and Prophets (2016), Black Sails (2016) and SAF3 (2013) have been shot and some are still in production in South Africa.

The table below shows the opportunities and strengths of the Western Cape's film sector

STRENGTHS	OPPORTUNITIES
• Increasing potential because of the province's natural beauty and attractions, climate, and associated travel and tourism services • Fast growing industry providing opportunities • Film incentives and local and foreign expertise • Province is a natural draw card as 80% of the world can be mimicked within a 2-hour drive radius of CoCT centre • Co-production treaties - although not all are as active as they should be • Cape Town Film Studios is highly acclaimed with prestigious productions • Western Cape set to become an African hub for film production • Inexpensive destination for foreign production companies due to the weakness of the rand • Supporting associations	• If the WC film industry grows on the back of its many attractions and conducive filming environment, there will be concomitant spinoffs for those in the travel, tourism and other service industries • As SA improves its technological capabilities and capacity, film makers (especially smaller ones) will find the distribution component of the value chain more affordable • Emerging Black Filmmakers Fund (EBFF) could pave the way for more black producers to enter the industry • Cost effective strategies for LHD vehicles

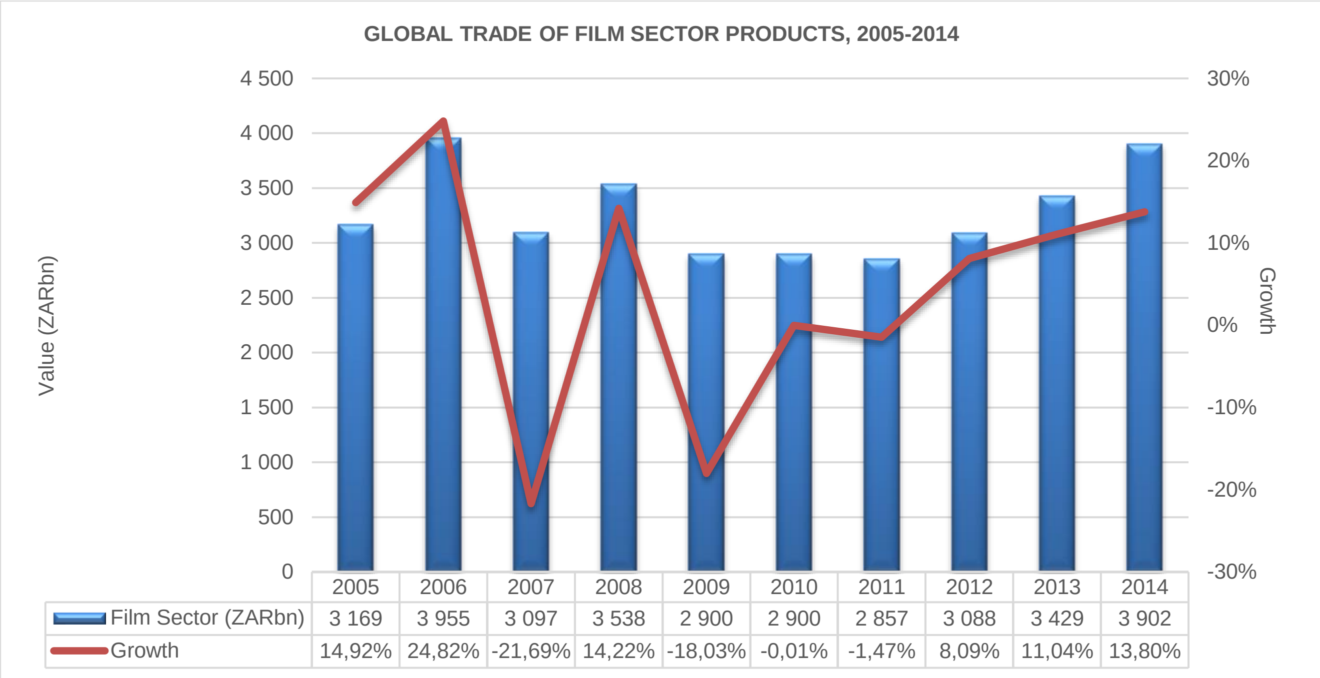
Source: IBIS, 2015

The key players in the Western Cape's film and television commercial production sector are shown in Appendix 1 and the key associations in South Africa are shown in appendix 2.

2. Trade

2.1 Global Trade

Global exports of all film sector goods increased by 14% in 2013 to reach ZAR3.9trn in 2014 from ZAR3.4trn in 2013. Overall the trade in film products increased by 8.3% over the period 2005 to 2014. Total film sector products represent all products within the film sector (from content design to final production).



Source: TradeMap, 2015

The top globally traded goods of cinematographic and television related goods in 2014 were television receivers (including video monitors and projectors) valued at ZAR1bn. Other top traded goods include parts suitable use with televisions valued at ZAR648m and radio and prepared unrecorded media for sound record valued at ZAR546m. Global exports of microphones and loudspeakers, increased by 22% in 2014.

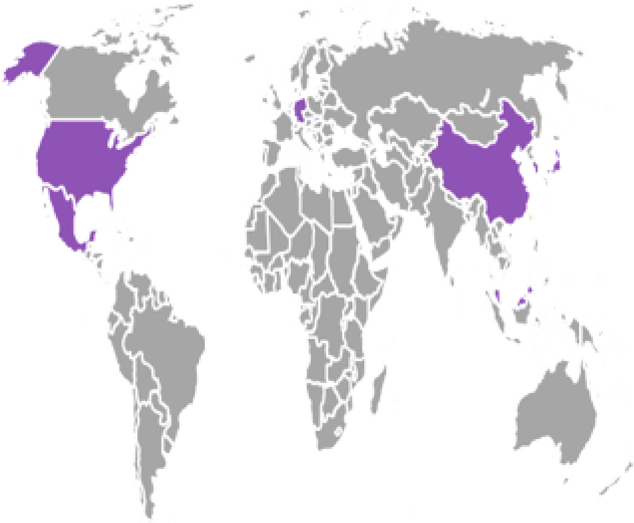
TOP 10 GLOBALLY EXPORTED PRODUCTS IN THE FILM SECTOR, 2014				
RANK	HS CODE	PRODUCT	VALUE 2014 (ZARm)	% GROWTH, 2013-2014
1	8528	Television receivers (incl video monitors & video projectors)	1 080	17.92%
2	8529	Part suitable for use solely/princ with televisions, reception app	648	15.00%
3	8523	Prepared unrecorded media for sound record (tapes)	546	16.08%
4	8525	Television camera, transmission app for radio-telephony	470	1.00%
5	8518	Microphones & stand; loud speaker; headphone/earphone; sound amplifier set	387	22.16%
6	8526	Radar apparatus, radio navigational app & radio remote control apparatus	197	15.12%
7	8527	Reception app for radio-telephony/radio-broadcasting	177	14.27%
8	8521	Video recording or reproducing apparatus	98	3.24%
9	3707	Photographic chemicals	77	11.77%
10	8522	Parts and accessories of video, magnetic recorder	63	0.01%
Total			**3 902**	**13.80%**

Source: TradeMap, 2015

The top 10 exporting markets for goods in the film and television sector in 2014 were China (ZAR1trn), the United States (ZAR289bn) and Hong Kong (ZAR285bn). Of the top 10 markets, Taiwanese exports were the fastest growing increasing by 33% in 2014.

TOP 10 EXPORTING MARKETS FOR GOODS IN THE FILM AND TELEVISION SECTOR, 2014				
RANK	SOURCE MARKETS	VALUE 2014 (ZARbn)	% GROWTH, 2013-2014	% SHARE, 2014
1	China	1 000	15.60%	25.61%
2	United States	289	11.24%	7.40%
3	Hong Kong, China	285	0.68%	7.31%
4	Mexico	260	15.92%	6.66%
5	Germany	209	14.40%	5.35%
6	Japan	193	-1.47%	4.94%
7	Korea, Republic of	161	11.56%	4.14%
8	Taiwan	142	32.66%	3.63%
9	Netherlands	138	9.53%	3.54%
10	Malaysia	114	16.63%	2.92%
39	South Africa	6.7	48.20%	0.17%
TOTAL		**3 902**	**13.80%**	**100.00%**

Source: TradeMap, 2015



The top 4 exported film products from the top 4 export markets are listed below:

China (HS4)

- Television receivers (incl. video monitors & video projectors) (ZAR328bn)
- Microphones & stand; loudspeaker; headphone / earphone; sound amplifier set (ZAR162bn)
- Part suitable for use solely/principally with televisions, reception app (ZAR144bn)
- Television camera, transmission app for radio-telephony (ZAR127bn)

United States (HS4)

- Prepared unrecorded media for sound record (tapes) (ZAR48bn)
- Television receivers (incl. video monitors & video projectors) (ZAR48bn)
- Part suitable for use solely/principally with televisions, reception app (ZAR44bn
- Television camera, transmission app for radio-telephony (ZAR43.7bn)

Hong Kong (HS4)

- Part suitable for use solely/principally with televisions, reception app (ZAR126bn)
- Microphones & stand; loudspeaker; headphone/earphone; sound amplifier set (ZAR42bn)
- Prepared unrecorded media for sound record (tapes) (ZAR31bn)
- Television camera, transmission app for radio-telephony (ZAR28bn)

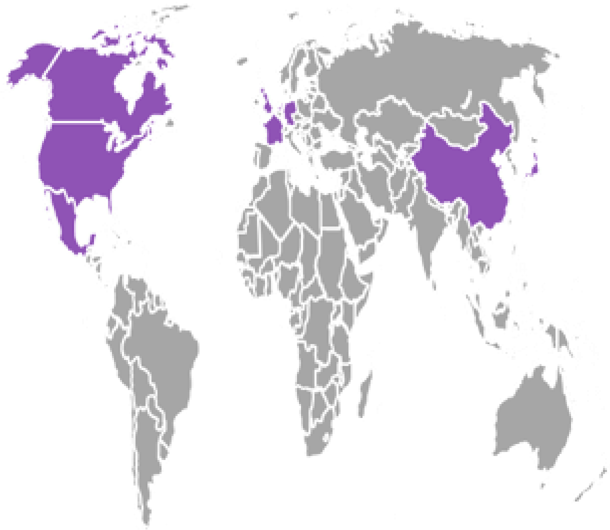
Mexico (HS4)

- Television receivers (incl. video monitors & video projectors) (ZAR183bn)
- Microphones & stand; loudspeaker; headphone/earphone; sound amplifier set (ZAR21bn)
- Reception app for radio-telephony/radio-broadcasting (ZAR19bn)
- Part suitable for use solely/principally with televisions, reception app (ZAR12bn)

The top two importing markets for goods in the film and television sector in 2014 were the United States (ZAR707bn), and China (ZAR361bn). The United Kingdom's import growth was the highest, increasing by 18% in 2014.

TOP 10 IMPORTING MARKETS FOR GOODS IN THE FILM & TELEVISION SECTOR, 2014				
RANK	DESTINATION MARKETS	VALUE 2014 (ZARbn)	% GROWTH, 2013-2014	% SHARE, 2014
1	United States	707	14.90%	17.10%
2	China	361	6.44%	8.75%
3	Hong Kong, China	289	-1.12%	7.00%
4	Germany	265	12.28%	6.40%
5	Mexico	194	14.13%	4.69%
6	Japan	173	7.45%	4.20%
7	United Kingdom	152	18.19%	3.67%
8	Netherlands	127	9.95%	3.07%
9	France	111	5.98%	2.69%
10	Canada	98	1.83%	2.38%
38	South Africa	18	1.66%	0.43%
TOTAL		**4 132**	**10.09%**	**100.00%**

Source: TradeMap, 2015



The top 4 imported film products from the top 4 import markets are listed below:

United States (HS4)

- Television receivers (incl. video monitors & video projectors) (ZAR292bn)
- Television camera, transmission app for radio-telephony (ZAR101bn)
- Prepared unrecorded media for sound record (tapes) (ZAR66bn)
- Microphones & stand; loudspeaker; headphone/earphone; sound amplifier set (ZAR63bn)

China (HS4)

- Television camera, transmission app for radio-telephony (ZAR112bn)
- Part suitable for use solely/principally with televisions, reception app (ZAR88bn)
- Prepared unrecorded media for sound record (tapes) (ZAR61bn)
- Microphones & stand; loudspeaker; headphone/earphone; sound amplifier set (ZAR41bn)

Hong Kong (HS4)

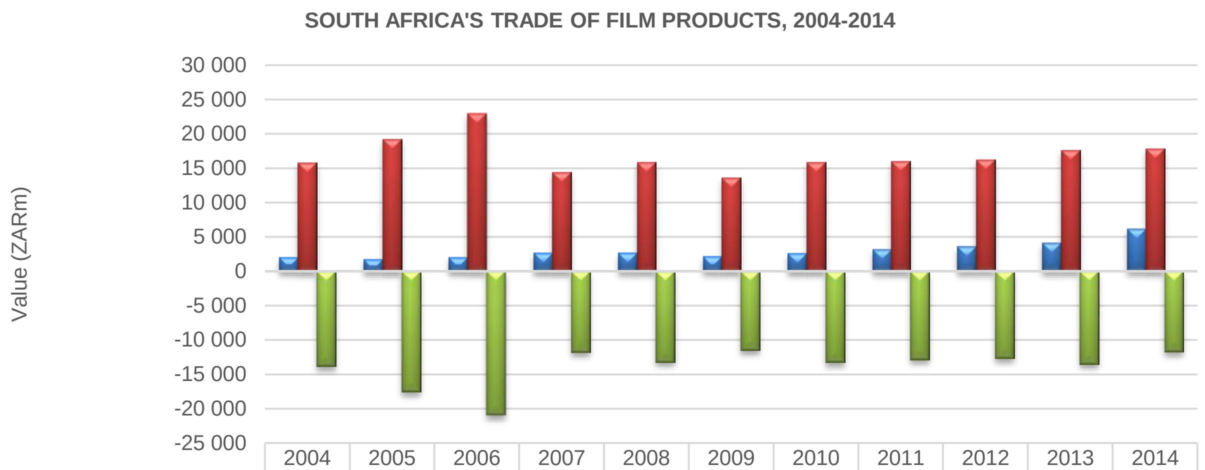
- Part suitable for use solely/principally with televisions, reception app (ZAR105bn)
- Prepared unrecorded media for sound record (tapes) (ZAR52bn)
- Television camera, transmission app for radio-telephony (ZAR42bn)
- Microphones & stand; loudspeaker; headphone/earphone; sound amplifier set (ZAR39bn)

Germany (HS4)

- Television receivers (incl. video monitors & video projectors) (ZAR75bn)
- Prepared unrecorded media for sound record (tapes) (ZAR45bn)
- Part suitable for use solely/principally with televisions, reception app (ZAR36bn)
- Television camera, transmission app for radio-telephony (ZAR25bn)

2.2 South African Trade

South Africa has been a net importer of film products over the period 2004 to 2014. The country's exports of film products grew by 48% in 2014 to reach ZAR6.2bn, while imports increased by 1.3% in 2014 to reach ZAR17.8bn in 2014. The creation and importation of film and television goods is an encouraging indicator of growth in the film sector as it relates to the creation of film and goods for the production of films.



	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Exports (ZARm)	2 083	1 763	2 071	2 698	2 749	2 200	2 681	3 230	3 625	4 205	6 238
Imports (ZARm)	15 852	19 266	22 974	14 453	15 908	13 668	15 899	16 029	16 257	17 658	17 890
Trade balance (ZARm)	-13 769	-17 503	-20 903	-11 754	-13 159	-11 468	-13 218	-12 799	-12 632	-13 453	-11 651

Source: Quantec, 2015

Africa was South Africa's largest export region for film and television products in 2014, estimated at over 60% share. Eight of the top ten export markets were from Africa with Zambia being the largest global export market at ZAR943m in 2014. Nigeria and Angola were ranked second and third at ZAR678m and ZAR580m respectively. India was the fastest growing market for South Africa's exports at 478%. China was the largest import market valued at ZAR7bn and accounting for 39%, followed by Thailand valued at ZAR2bn.

TOP 10 EXPORTING MARKETS FOR GOODS IN THE FILM & TELEVISION SECTOR, 2014					TOP 10 IMPORTING MARKETS FOR GOODS IN THE FILM & TELEVISION SECTOR, 2014				
RANK	SOURCE MARKETS	VALUE 2014 (ZARm)	% GROWTH, 2013-2014	% SHARE, 2014	RANK	DESTINATION MARKETS	VALUE 2014 (ZARm)	% GROWTH, 2013-2014	% SHARE, 2014
1	Zambia	943	117.86%	15.11%	1	China	7 007	3.76%	39.17%
2	Nigeria	678	403.61%	10.87%	2	Thailand	1 962	16.04%	10.97%
3	Angola	580	110.58%	9.29%	3	United States	869	5.33%	4.86%
4	Namibia	579	16.65%	9.28%	4	Germany	796	-1.92%	4.45%
5	Botswana	422	8.96%	6.77%	5	Japan	669	-9.15%	3.74%
6	Mozambique	330	88.90%	5.29%	6	United Kingdom	654	7.12%	3.66%
7	United States	234	42.46%	3.75%	7	Republic of Korea	640	3.11%	3.58%
8	India	210	478.40%	3.37%	8	Taiwan	531	-14.71%	2.97%
9	Kenya	205	-27.74%	3.29%	9	Malaysia	475	-32.54%	2.65%
10	Zimbabwe	136	2.55%	2.17%	10	Netherlands	419	-2.25%	2.34%
TOTAL EXPORTS		**6 238**	**48.35%**	**100.00%**	**TOTAL IMPORTS**		**17 890**	**1.31%**	**100.00%**

Source: Quantec, 2015

The top 4 exported film and television products from the top 4 export markets for South Africa are listed below:

Zambia (HS4)

- Monitors and projectors (ZAR678m)
- Sound recording or reproducing apparatus (ZAR54m)
- Transmission apparatus for radio-broadcasting (ZAR49m)
- Microphones and stands (ZAR46m)

Nigeria (HS4)

- Monitors and projectors (ZAR509m)
- Transmission apparatus for radio-broadcasting (ZAR118m)
- Parts suitable for use solely or principally with the apparatus (ZAR29m)
- Radar, radio navigation and remote control apparatus (ZAR7m)

Angola (HS4)

- Monitors and projectors (ZAR524m)
- Discs and tapes (ZAR20m)
- Parts suitable for use solely or principally with the apparatus (ZAR10m)
- Transmission apparatus for radio-broadcasting (ZAR9.7m)

Namibia (HS4)

- Monitors and projectors (ZAR258m)
- Discs and tapes (ZAR81m)
- Transmission apparatus for radio-broadcasting (ZAR62m)
- Radar, radio navigation and remote control apparatus (ZAR38m)

The top 4 imports for film and television products to the top 4 import markets into South Africa are listed below:

China (HS4)

- Parts suitable for use solely or principally with the apparatus (ZAR1.8bn)
- Monitors and projectors (ZAR1.4bn)
- Discs and tapes (ZAR960m)
- Microphones and stands, loudspeakers (ZAR815m)

Thailand (HS4)

- Parts suitable for use solely or principally with the apparatus (ZAR1.5bn)
- Transmission apparatus for radio-broadcasting (ZAR143m)
- Reception apparatus for radio broadcasting (ZAR137m)
- Discs and tapes (ZAR41m)

United States (HS4)

- Radar, radio navigation and remote control apparatus (ZAR274m)
- Discs and tapes (ZAR162m)
- Transmission apparatus for radio-broadcasting (ZAR135m)
- Parts suitable for use solely or principally with the apparatus (ZAR106m)

Germany (HS4)

- Photographic plates and film in the flat (ZAR193m)
- Discs and tapes (ZAR187m)
- Transmission apparatus for radio-broadcasting (ZAR138m)
- Parts suitable for use solely or principally with the apparatus (ZAR132m)

The top exports of cinematographic and television related goods from South Africa in 2014 were television monitors, projectors (ZAR2.8bn), parts for radio, TV transmission, receive equipment (ZAR1bn) and radio and TV transmitters (ZAR681m). Exports of monitors and projectors was the fastest growing product at 90% in 2014.

The top imports of cinematographic and television related goods to South Africa in 2014 were for parts for monitors and projectors and transmission apparatus (ZAR4.2bn); discs, tapes, solid-state non-volatile storage (ZAR3.6bn) and transmission apparatus for radio-broadcasting or television (ZAR2.5bn).

TOP EXPORTS OF FILM & TELEVISION RELATED GOODS FROM SOUTH AFRICA, 2014					TOP IMPORTS OF FILM & TELEVISION RELATED GOODS TO SOUTH AFRICA, 2014				
RANK	HS CODE	PRODUCT	VALUE 2014 (ZARm)	% GROWTH, 2013-2014	RANK	HS CODE	PRODUCT	VALUE 2014 (ZARm)	% GROWTH, 2013-2014
1	8528	Monitors and projectors, not incorporating television reception apparatus; reception apparatus for television,	2 829	90.30%	1	8529	Parts suitable for use solely or principally with the apparatus of headings 85.25 to 85.28	4 298	6.77%
2	8529	Parts suitable for use solely or principally with the apparatus of headings 85.25 to 85.28	1 038	46.85%	2	8523	Discs, tapes, solid-state non-volatile storage devices, 'smart cards' and other media for the recording of sou	3 624	-3.76%
3	8525	Transmission apparatus for radio-broadcasting or television, whether or not incorporating reception apparatus	681	11.13%	3	8525	Transmission apparatus for radio-broadcasting or television, whether or not incorporating reception apparatus	2 486	2.78%
4	8526	Radar apparatus, radio navigational aid apparatus and radio remote control apparatus	485	32.24%	4	8528	Monitors and projectors, not incorporating television reception apparatus; reception apparatus for television,	2 092	-15.21%
5	8523	Discs, tapes, solid-state non-volatile storage devices, 'smart cards' and other media for the recording of sound	471	74.63%	5	8526	Radar apparatus, radio navigational aid apparatus and radio remote control apparatus	1 356	29.59%
6	8518	Microphones and stands therefor; loudspeakers, whether or not mounted in their enclosures; headphones and earphones	225	13.13%	6	8518	Microphones and stands therefor; loudspeakers, whether or not mounted in their enclosures; headphones and earphones	1 301	4.07%
7	8527	Reception apparatus for radio-broadcasting, whether or not combined, in the same housing, with sound recording	139	10.76%	7	8527	Reception apparatus for radio-broadcasting, whether or not combined, in the same housing, with sound recording	1 021	3.76%
8	8519	Sound recording or reproducing apparatus	78	21.44%	8	3701	Photographic plates and film in the flat, sensitised, unexposed, of any material (excluding paper, paperboard	487	5.51%
9	3707	Chemical preparations for photographic uses (excluding varnishes, glues, adhesives and similar preparations);	75	-9.79%	9	3707	Chemical preparations for photographic uses (excluding varnishes, glues, adhesives and similar preparations);	408	4.11%
10	8521	Video recording or reproducing apparatus, whether or not incorporating a video tuner	65	-10.59%	10	8521	Video recording or reproducing apparatus, whether or not incorporating a video tuner	387	12.08%
11	9010	Apparatus and equipment for photographic (including cinematographic) laboratories, not specified or included e	53	-18.42%	11	8519	Sound recording or reproducing apparatus	169	19.02%
12	9007	Cinematographic cameras and projectors, whether or not incorporating sound recording or reproducing apparatus	32	-50.15%	12	9007	Cinematographic cameras and projectors, whether or not incorporating sound recording or reproducing apparatus	106	-47.60%
13	3702	Photographic film in rolls, sensitised, unexposed, of any material (excluding paper, paperboard or textiles);	25	65.00%	13	9010	Apparatus and equipment for photographic (including cinematographic)	58	13.53%

TOP EXPORTS OF FILM & TELEVISION RELATED GOODS FROM SOUTH AFRICA, 2014					TOP IMPORTS OF FILM & TELEVISION RELATED GOODS TO SOUTH AFRICA, 2014				
RANK	HS CODE	PRODUCT	VALUE 2014 (ZARm)	% GROWTH, 2013-2014	RANK	HS CODE	PRODUCT	VALUE 2014 (ZARm)	% GROWTH, 2013-2014
							laboratories, not specified or included e		
14	3701	Photographic plates and film in the flat, sensitised, unexposed, of any material (excluding paper, paperboard	14.9	-20.83%	14	3702	Photographic film in rolls, sensitised, unexposed, of any material (excluding paper, paperboard or textiles);	34	-9.38%
15	3703	Photographic paper, paperboard and textiles, sensitised, unexposed	8.4	-75.45%	15	3703	Photographic paper, paperboard and textiles, sensitised, unexposed	33	-4.08%
TOTAL EXPORTS			**6 238**	**48.35%**	**TOTAL IMPORTS**			**17 890**	**1.31%**

Source: Quantec, 2015

The top 4 exported products from South Africa and their destination markets are listed below:

Monitors and projectors, not incorporating television reception apparatus

- Zambia (ZAR678m)
- Angola (ZAR524m)
- Nigeria (ZAR509m)
- Namibia (ZAR258m)

Parts suitable for use solely or principally with the apparatus

- United States (ZAR203m)
- India (ZAR100m)
- France (ZAR93m)
- Russia (ZAR89m)

Transmission apparatus for radio-broadcasting or television

- Nigeria (ZAR118m)
- India (ZAR101m)
- Namibia (ZAR62m)
- Mozambique (ZAR57m)

Radar apparatus, radio navigational aid apparatus

- Saudi Arabia (ZAR93m)
- Russia (ZAR42m)
- Namibia (ZAR38m)
- Egypt (ZAR34m)

The top 4 imported film and television products and their source markets into the Western Cape are listed below:

Parts suitable for use solely or principally with the apparatus

- China (ZAR1.7bn)
- Thailand (ZAR1.5bn)
- Republic of Korea (ZAR455m)
- Germany (ZAR132m)

Discs, tapes, solid-state non-volatile storage devices

- China (ZAR960m)
- United Kingdom (ZAR328m)
- Ireland (ZAR317m)
- Netherlands (ZAR222m)

Transmission apparatus for radio-broadcasting or television

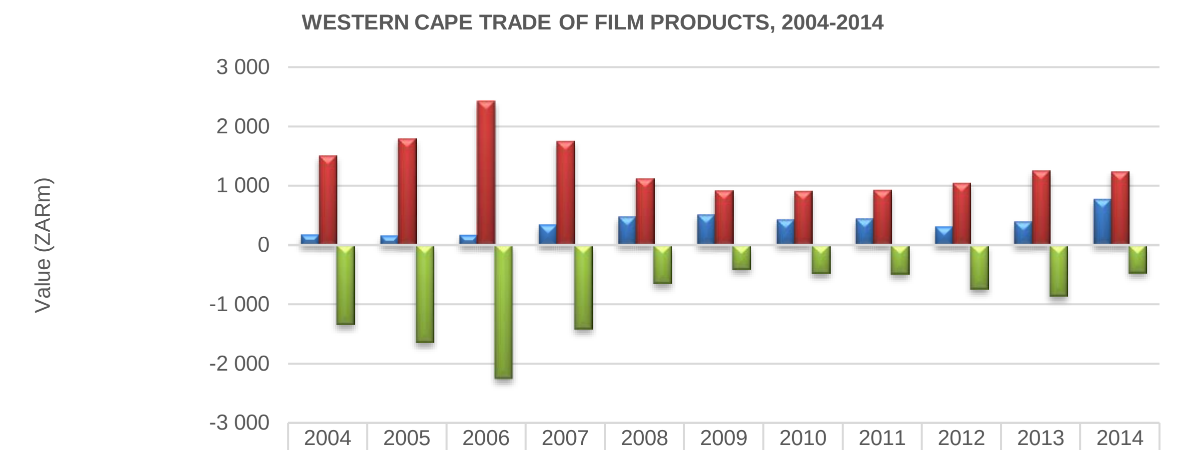
- China (ZAR805m)
- Japan (ZAR1250m)
- Malaysia (ZAR197m)
- Thailand (ZAR143m)

Monitors and projectors, not incorporating television reception apparatus

- China (ZAR1.4bn)
- Lesotho (ZAR107m)
- Vietnam (ZAR74m)
- Republic of Korea (ZAR72m)

2.3 Western Cape Trade

The Western Cape's exports of film products increased by 95% in 2014, while imports decreased by 1.1%..The Western Cape has been a net importer of film products over the period 2004 to 2014.



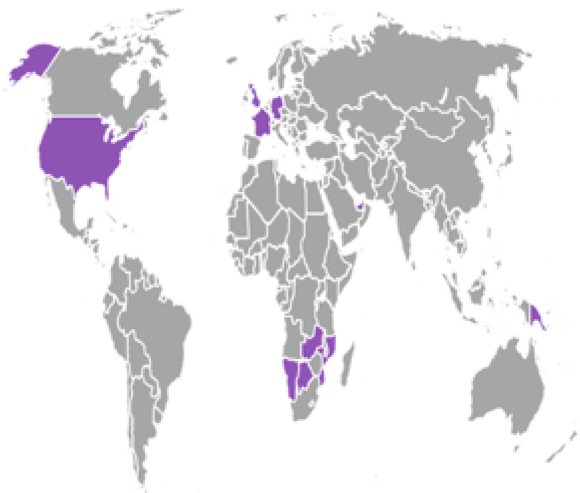
	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Exports (ZARm)	176	162	173	343	479	519	440	449	312	399	778
Imports (ZARm)	1 509	1 797	2 427	1 753	1 125	922	913	932	1 050	1 257	1 243
Trade balance (ZARm)	-1 333	-1 634	-2 254	-1 410	-646	-403	-473	-482	-738	-859	-465

Source: Quantec, 2015

The United States was the largest global export market for Western Cape film and television products in 2014 valued at ZAR187m in 2014. Namibia and France were ranked second and third at ZAR101m and ZAR87m respectively. UAE was the fastest growing market for the Western Cape's exports.

TOP 10 EXPORTING MARKETS FOR GOODS IN THE FILM & TELEVISION SECTOR, 2014				
RANK	DESTINATION MARKETS	VALUE 2014 (ZARm)	% GROWTH, 2013-2014	% SHARE, 2014
1	United States	187	47.63%	24.01%
2	Namibia	101	-	13.01%
3	France	87	48.49%	11.22%
4	United Kingdom	71	89.77%	9.13%
5	Germany	42	284.35%	5.35%
6	Mozambique	32	85.12%	4.07%
7	Botswana	28	-	3.64%
8	United Arab Emirates	18	322.90%	2.36%
9	Zambia	14	-	1.77%
10	Papua New Guinea	12	-	1.56%
TOTAL		**778**	**195%**	**100.00%**

Source: Quantec, 2015



The top 4 exported film products from the top 4 export markets for the Western Cape are listed below:

United States (HS4)

- Parts suitable for use solely or principally with the apparatus (ZAR183m)
- Radar, radio navigation and remote control apparatus (ZAR2m)
- Discs and tapes (ZAR1.6m)
- Transmission apparatus for radio-broadcasting (ZAR0.3m)

Namibia (HS4)

- Discs and tapes (ZAR40m)
- Monitors and projectors (ZAR18m)
- Radar, radio navigation and remote control apparatus (ZAR11m)
- Transmission apparatus for radio-broadcasting (ZAR9m)

France (HS4)

- Parts suitable for use solely or principally with the apparatus (ZAR80m)
- Discs and tapes (ZAR6m)
- Radar, radio navigation and remote control apparatus (ZAR0.5m)
- Apparatus and equipment for photographic (ZAR0.1m)

United Kingdom (HS4)

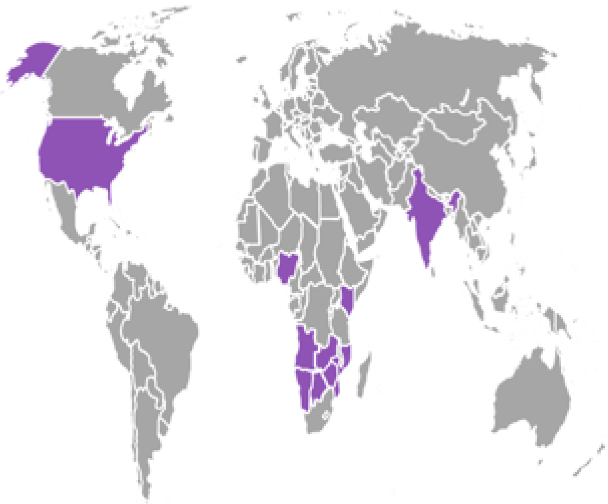
- Discs and tapes (ZAR44m)
- Parts suitable for use solely or principally with the apparatus (ZAR21m)
- Transmission apparatus for radio-broadcasting (ZAR4m)
- Cinematographic cameras and projectors (ZAR1m)

China was the largest global import market for Western Cape film and television products in 2014 valued at ZAR650m in 2014. The United Kingdom and the United States were ranked second and third at ZAR147m and ZAR72m respectively. Thailand was the fastest growing market for Western Cape's imports.

TOP 10 IMPORTING MARKETS FOR GOODS IN THE FILM & TELEVISION SECTOR, 2014

RANK	SOURCE MARKETS	VALUE 2014 (ZARm)	% GROWTH, 2013-2014	% SHARE, 2014
1	China	650	-5.45%	52.29%
2	United Kingdom	147	66.55%	11.84%
3	United States	72	-11.51%	5.81%
4	Taiwan	54	-4.53%	4.37%
5	Germany	42	-46.03%	3.35%
6	Netherlands	38	14.66%	3.09%
7	Japan	36	18.50%	2.88%
8	Ireland	26	67.14%	2.09%
9	Thailand	26	411.16%	2.08%
10	Mexico	24	5.55%	1.93%
TOTAL		**1 243**	**-1.15%**	**100.00%**

Source: Quantec, 2015



The top 4 imported film products from the top 4 import markets are listed below:

China (HS4)

- Discs and tapes (ZAR166m)
- Parts suitable for use solely or principally with the apparatus (ZAR140m)
- Microphones and stands, loudspeakers (ZAR100m)
- Radar, radio navigation and remote control apparatus (ZAR80m)

United Kingdom (HS4)

- Discs and tapes (ZAR82m)
- Cinematographic cameras and projectors (ZAR34m)
- Transmission apparatus for radio-broadcasting (ZAR12m)
- Parts suitable for use solely or principally with the apparatus (ZAR6m)

United States (HS4)

- Transmission apparatus for radio-broadcasting (ZAR19m)
- Parts for radio, TV transmission, receive equipment (ZAR18.6m)
- Discs and tapes (ZAR11m)
- Cinematographic cameras and projectors (ZAR8m)

Taiwan (HS4)

- Discs and tapes (ZAR20m)
- Parts suitable for use solely or principally with the apparatus (ZAR18m)
- Transmission apparatus for radio-broadcasting (ZAR12m)
- Chemical preparations for photographic uses (ZAR2m)

The top exports of cinematographic and television related goods from the Western Cape in 2014 were parts suitable for use solely or principally with the apparatus (ZAR321m) and discs, tapes, solid-state non-volatile storage devices (ZAR223m). The top imports of cinematographic and television related goods to the Western Cape in 2014 were discs, tapes, solid-state non-volatile storage devices (ZAR362m) and parts suitable for use solely or principally with the apparatus (ZAR210m).

TOP EXPORTS OF FILM & TELEVISION RELATED GOODS FROM WESTERN CAPE, 2014					TOP IMPORTS OF FILM & TELEVISION RELATED GOODS TO WESTERN CAPE, 2014				
RANK	HS CODE	PRODUCT	VALUE 2014 (ZARm)	% GROWTH 2013-2014	RANK	HS CODE	PRODUCT	VALUE 2014 (ZARm)	% GROWTH, 2013-2014
1	8529	Parts suitable for use solely or principally with the apparatus of headings 85.25 to 85.28	321.5	32.87%	1	8523	Discs, tapes, solid-state non-volatile storage devices, 'smart cards' and other media for the recording	362.1	9.73%
2	8523	Discs, tapes, solid-state non-volatile storage devices, 'smart cards' and other media for the recording of sound	223.4	791.98%	2	8529	Parts suitable for use solely or principally with the apparatus of headings 85.25 to 85.28	209.7	49.69%
3	8528	Monitors and projectors, not incorporating television reception apparatus; reception apparatus for television,	76.5	248.73%	3	8525	Transmission apparatus for radio-broadcasting or television, whether or not incorporating reception apparatus	174.3	-28.66%
4	8525	Transmission apparatus for radio-broadcasting or television, whether or not incorporating reception apparatus	53.0	77.63%	4	8518	Microphones and stands therefor; loudspeakers, whether or not mounted in their enclosures; headphones and earphones	142.5	-0.46%
5	8526	Radar apparatus, radio navigational aid apparatus and radio remote control apparatus	50.7	-4.84%	5	8526	Radar apparatus, radio navigational aid apparatus and radio remote control apparatus	132.0	-21.49%
6	8518	Microphones and stands therefor; loudspeakers, whether or not mounted in	19.5	44.78%	6	8527	Reception apparatus for radio-broadcasting, whether or not	55.1	62.00%

TOP EXPORTS OF FILM & TELEVISION RELATED GOODS FROM WESTERN CAPE, 2014					TOP IMPORTS OF FILM & TELEVISION RELATED GOODS TO WESTERN CAPE, 2014				
RANK	**HS CODE**	**PRODUCT**	**VALUE 2014 (ZARm)**	**% GROWTH 2013-2014**	**RANK**	**HS CODE**	**PRODUCT**	**VALUE 2014 (ZARm)**	**% GROWTH, 2013-2014**
		their enclosures; headphones and earphones					combined, in the same housing, with sound recording		
7	8527	Reception apparatus for radio-broadcasting, whether or not combined, in the same housing, with sound recording	17.3	402.51%	7	9007	Cinematographic cameras and projectors, whether or not incorporating sound recording or reproducing apparatus	52.4	-21.94%
8	8521	Video recording or reproducing apparatus, whether or not incorporating a video tuner	5.2	311.10%	8	8528	Monitors and projectors, not incorporating television reception apparatus; reception apparatus for television,	37.6	6.57%
9	3703	Photographic paper, paperboard and textiles, sensitised, unexposed	2.4	561.22%	9	8521	Video recording or reproducing apparatus, whether or not incorporating a video tuner	24.0	-22.17%
10	8522	Parts and accessories suitable for use solely or principally with the apparatus of headings 85.19 or 85.21	1.9	1139.40%	10	8519	Sound recording or reproducing apparatus	18.4	37.67%
11	9007	Cinematographic cameras and projectors, whether or not incorporating sound recording or reproducing apparatus	1.7	-66.06%	11	3707	Chemical preparations for photographic uses (excluding varnishes, glues, adhesives and similar preparations);	14.9	-11.92%
12	3707	Chemical preparations for photographic uses (excluding varnishes, glues, adhesives and similar preparations);	1.6	766.26%	12	3701	Photographic plates and film in the flat, sensitised, unexposed, of any material (excluding paper, paperboard	9.2	-59.62%
13	9010	Apparatus and equipment for photographic (including cinematographic) laboratories, not specified or included e	1.3	-15.66%	13	9010	Apparatus and equipment for photographic (including cinematographic) laboratories, not specified or included e	5.1	36.19%
14	8519	Sound recording or reproducing apparatus	0.9	77.62%	14	3702	Photographic film in rolls, sensitised, unexposed, of any material (excluding paper, paperboard or textiles);	2.8	-19.74%
15	9008	Image projectors (excluding cinematographic); photographic (excluding cinematographic) enlargers and reducers	0.6	521.84%	15	8522	Parts and accessories suitable for use solely or principally with the apparatus of headings 85.19 or 85.21	1.7	-43.96%
TOTAL EXPORTS			**778**	**195%**	**TOTAL IMPORTS**			**1 243**	**-1.15%**

Source: TradeMap, 2015

The top 4 exported products from Western Cape and their destination markets are listed below:

Parts suitable for use solely or principally with the apparatus
- United States (ZAR183m)
- France (ZAR81m)
- United Kingdom (ZAR21m)
- Namibia (ZAR6m)

Discs, tapes, solid-state non-volatile storage devices
- United Kingdom (ZAR44m)
- Germany (ZAR41m)
- Namibia (ZAR40m)
- Botswana (ZAR11m)

Monitors and projectors, not incorporating television reception apparatus
- Namibia (ZAR18m)
- Mozambique (ZAR18m)
- Botswana (ZAR11m)
- Zambia (ZAR10m)

Transmission apparatus for radio-broadcasting or television
- UAE (ZAR11m)
- Namibia (ZAR9m)
- United Kingdom (ZAR4m)
- Saudi Arabia (ZAR2m)

The top 4 imported film products and their source markets into South Africa are listed below:

Discs, tapes, solid-state non-volatile storage devices
- China (ZAR166m)
- United Kingdom (ZAR82m)
- Ireland (ZAR24m)
- Taiwan (ZAR20m)

Parts suitable for use solely or principally with the apparatus
- China (ZAR140m)
- United States (ZAR19m)
- Taiwan (ZAR18m)
- United Kingdom (ZAR6m)

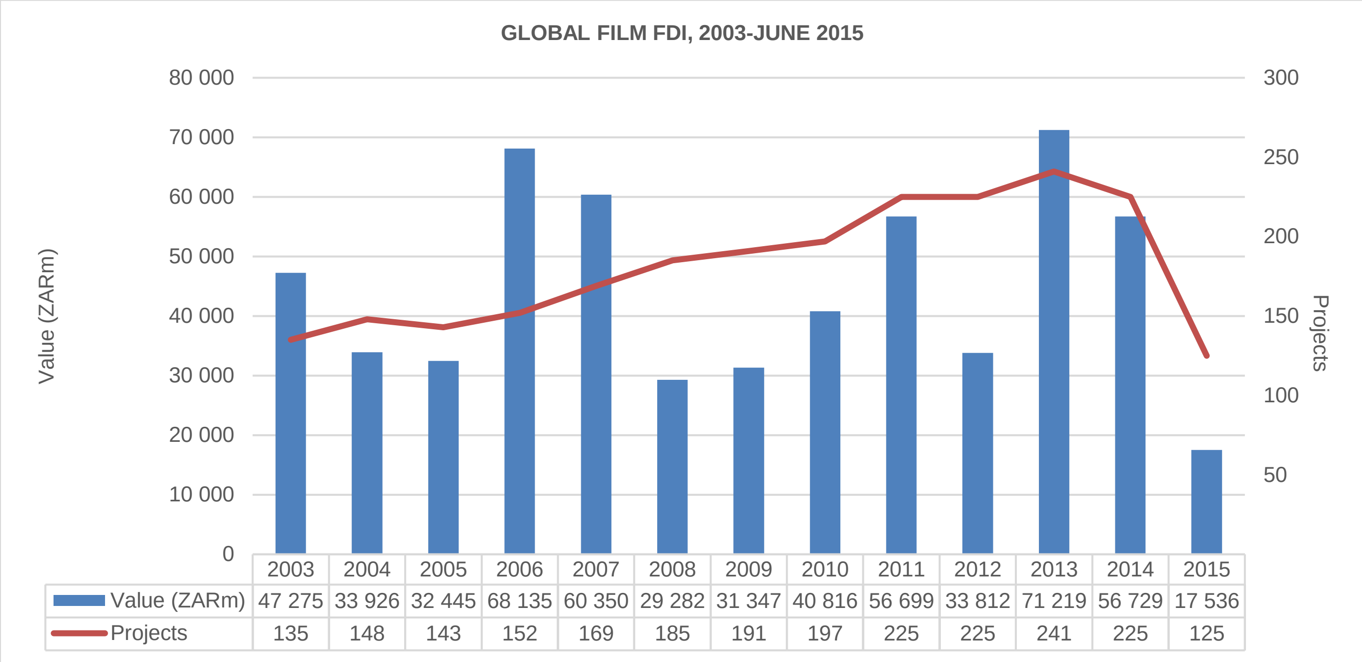
Transmission apparatus for radio-broadcasting or television
- China (ZAR70m)
- United States (ZAR19m)
- Canada (ZAR13m)
- Taiwan (ZAR12m)

Microphones and stands therefor; loudspeakers
- China (ZAR100m)
- Mexico (ZAR24m)
- Australia (ZAR3m)
- Vietnam (ZAR2.7m)

3 FDI

3.1 Global FDI

Between January 2003 and June 2015 a total of 2,361 FDI projects were recorded into the global film sector. These projects represent a total capital investment of ZAR579.57bn which is an average investment of ZAR246.06m per project. During the period, a total of 317,790 jobs were created. FDI activity by projects and capex peaked in 2013 with 241 investment projects and capex valued at ZAR71bn.



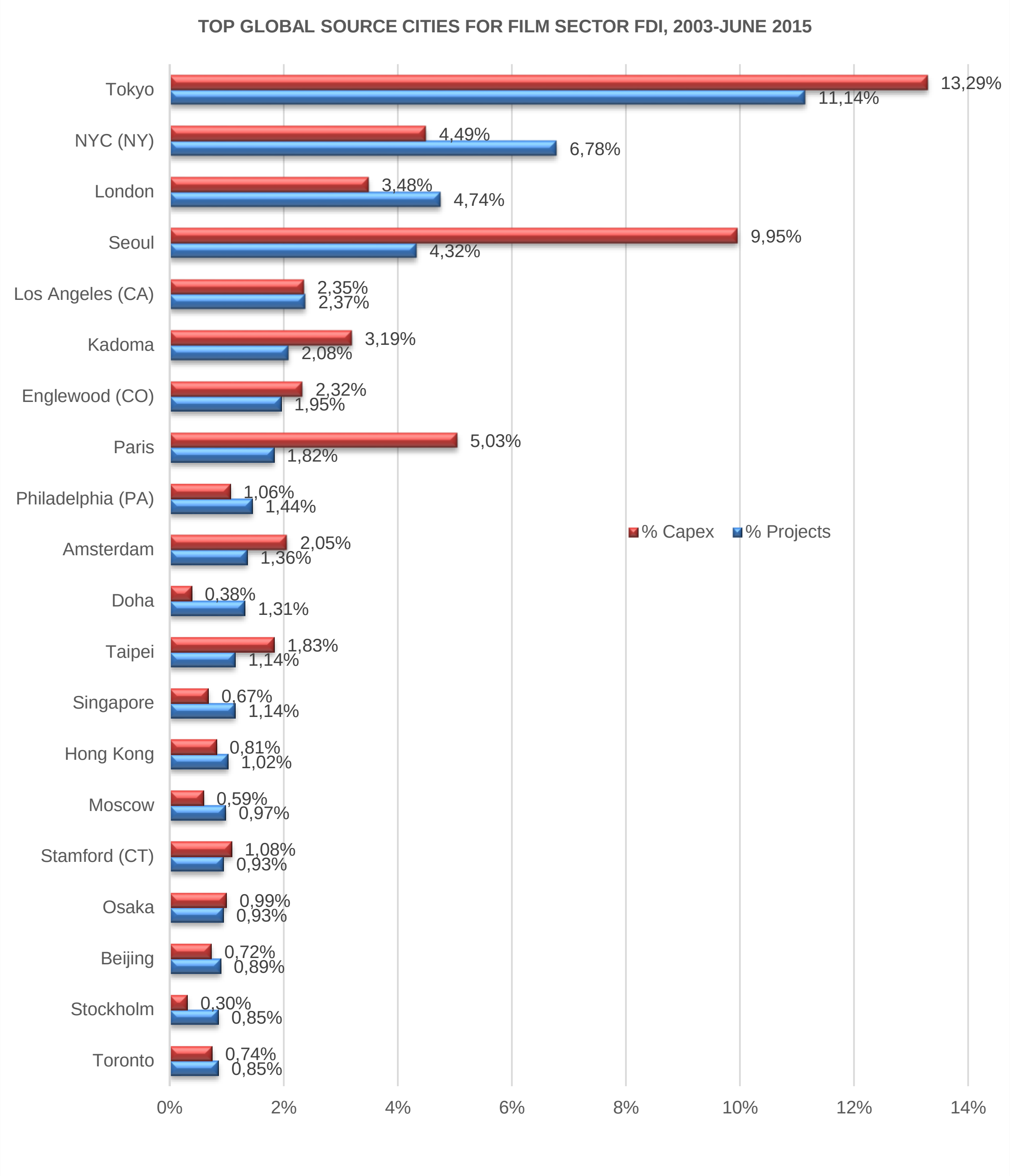
Source: FDI Intelligence, 2015

The top source markets for FDI in the film sector in this period were the United States accounting for 32%, Japan (15%) and the United Kingdom (9%). The United States (ZAR156bn) and Japan (ZAR107bn) were also the top source markets in terms of the value of FDI projects.

TOP 10 SOURCE MARKETS FOR FDI IN THE FILM SECTOR, 2003-JUNE 2015							
RANK	SOURCE COUNTRY	PROJECTS	% PROJECTS	CAPEX (ZARm)	% CAPEX	COMPANIES	% COMPANIES
1	United States	760	32.19%	156 210.6	26.95%	374	31.24%
2	Japan	367	15.54%	106 878.3	18.44%	131	10.94%
3	UK	207	8.77%	44 285.8	7.64%	123	10.28%
4	South Korea	124	5.25%	63 547.4	10.96%	45	3.76%
5	Germany	108	4.57%	12 067.4	2.08%	66	5.51%
6	France	80	3.39%	32 303.9	5.57%	38	3.17%
7	China	78	3.30%	28 186.5	4.86%	40	3.34%
8	Taiwan	65	2.75%	35 542.5	6.13%	38	3.17%
9	Netherlands	54	2.29%	14 245.6	2.46%	25	2.09%
10	Spain	44	1.86%	4 040.0	0.70%	18	1.50%
TOTAL		**2 361**	**100.00%**	**579 568.9**	**100.00%**	**1 197**	**100.00%**

Source: FDI Intelligence, 2015

Tokyo was the top source market for FDI in the film sector both in terms of projects and capex accounting for 11% and 13% respectively, followed by New York (7%) and London (5%). Tokyo was also the largest source city for FDI by capex, accounting for 15%, followed by Seoul (11%) and New York (4%).



Source: FDI Intelligence, 2015

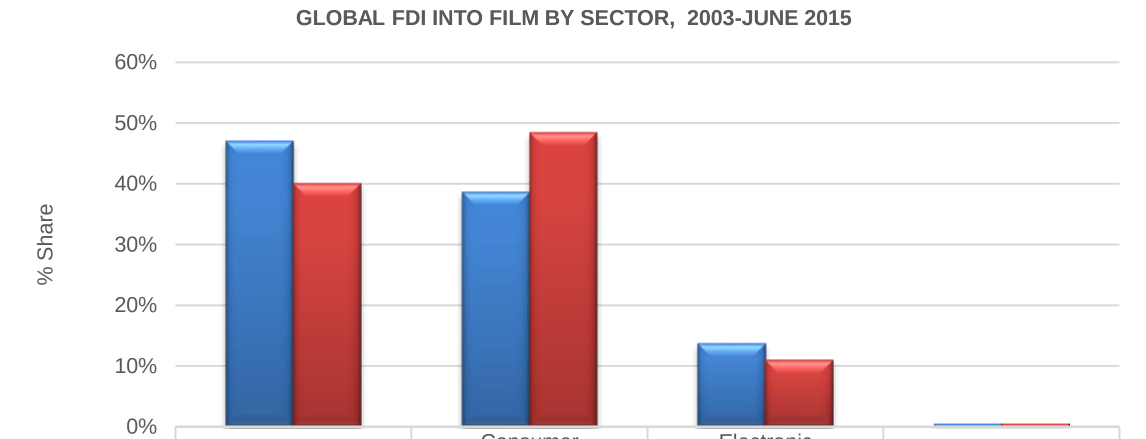
The top destination markets for FDI in the film sector in this period were the United States (485 projects), China (209 projects) and the United Kingdom (170 projects). Other top markets were Germany (119 projects), India (96 projects) and UAE (85 projects).

TOP 10 DESTINATION MARKETS FOR FDI IN THE FILM SECTOR, 2003-JUNE 2015							
RANK	DESTINATION COUNTRY	PROJECTS	% PROJECTS	CAPEX (ZARm)	% CAPEX	COMPANIES	% COMPANIES
1	United States	485	20.54%	99 070.0	17.09%	340	28.40%
2	China	209	8.85%	72 229.8	12.46%	156	13.03%
3	UK	170	7.20%	22 616.3	3.90%	145	12.11%
4	Germany	119	5.04%	19 881.5	3.43%	109	9.11%
5	India	96	4.07%	22 318.6	3.85%	69	5.76%
6	UAE	85	3.60%	16 778.8	2.90%	73	6.10%
7	France	79	3.35%	6 519.4	1.12%	79	6.60%
8	Singapore	62	2.63%	15 077.5	2.60%	60	5.01%
9	Spain	56	2.37%	6 611.9	1.14%	45	3.76%
10	Canada	50	2.12%	42 404.0	7.32%	44	3.68%
TOTAL		**2 361**	**100.00%**	**579 568.9**	**100.00%**	**1 197**	**100.00%**

Source: FDI Intelligence, 2015

The figure below is a breakdown of FDI activity in the film sector from 2003 to June 2015, by sector. The top sectors in terms of FDI projects initiated were:

- Communications (47% projects and 40% Capex),
- Consumer electronics (39% projects and 48% Capex),
- Electronic components (14% projects and 11% Capex), and
- Consumer products (0.6% projects and 0.6% Capex).

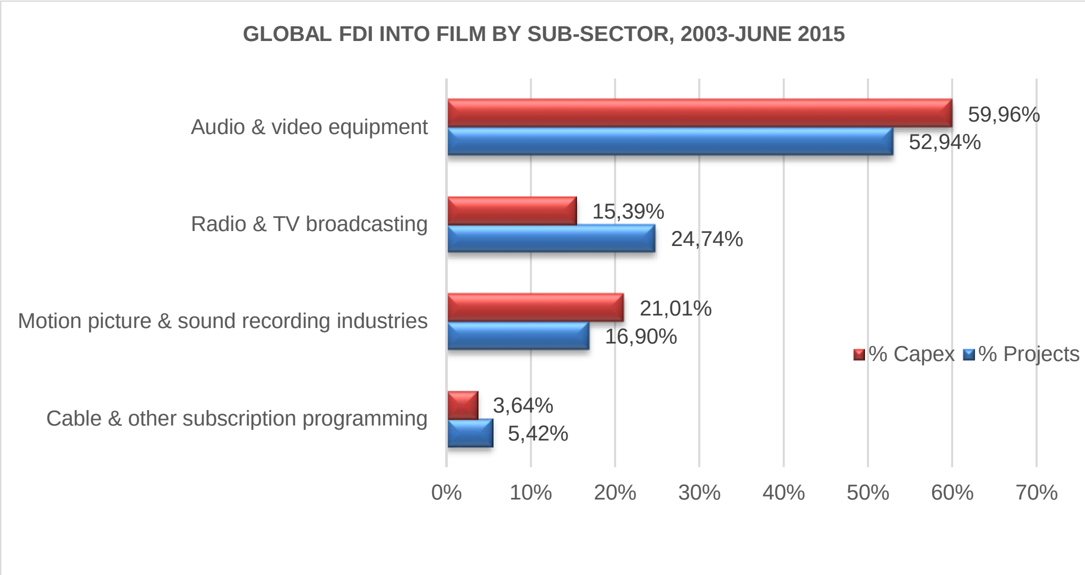


	Communications	Consumer Electronics	Electronic Components	Consumer Products
% Projects	47,06%	38,67%	13,72%	0,55%
% Capex	40,04%	48,44%	10,92%	0,59%

Source: FDI Intelligence, 2015

The figure below is a breakdown of FDI activity in the film sector from 2003 to June 2015, by sub-sector. The top sub-sectors in terms of FDI projects initiated were:

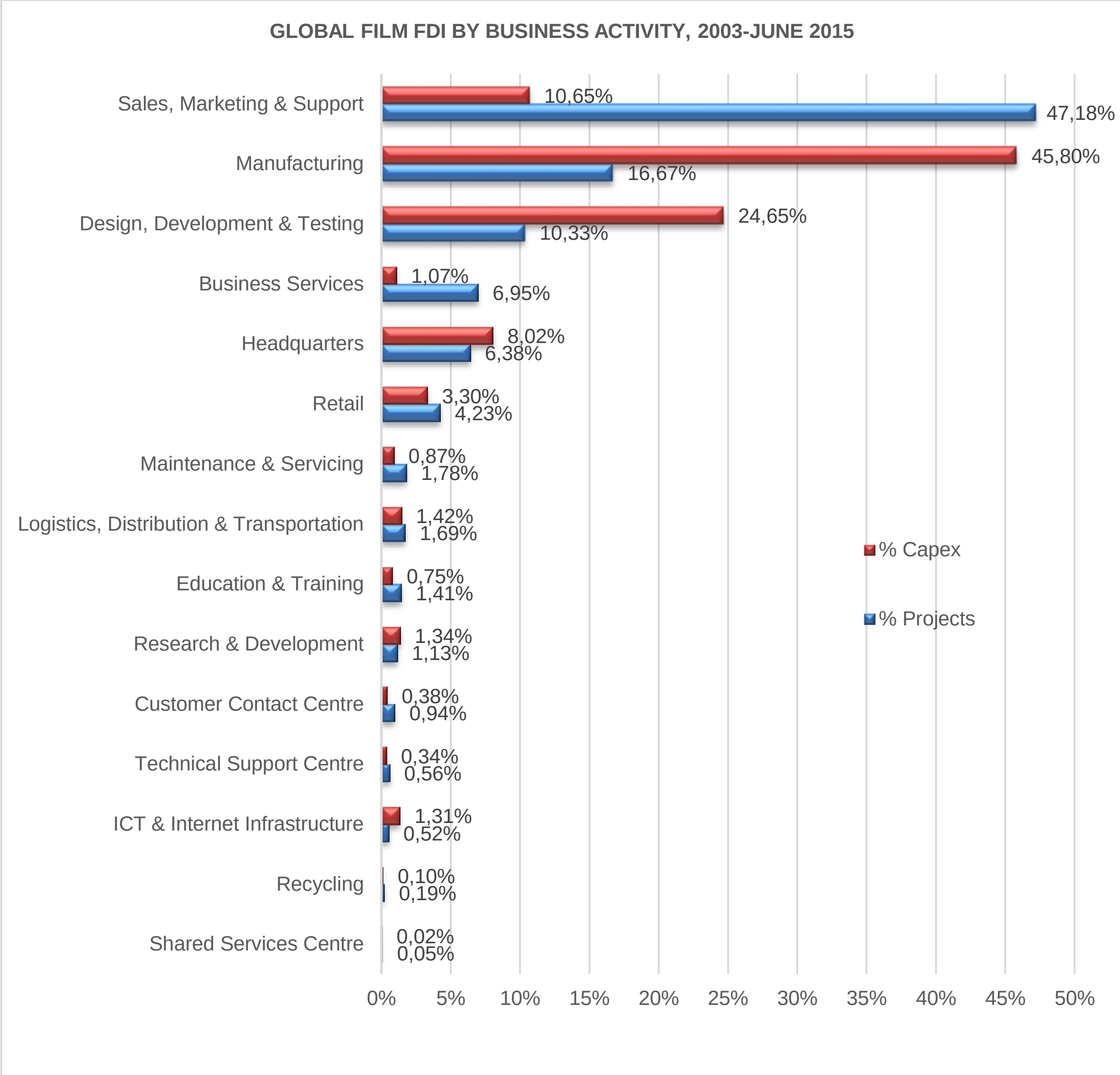
- Audio and video equipment (60% projects and 53% Capex),
- Radio & TV broadcasting (15% projects and 25% Capex),
- Motion picture & sound recording industries (21% projects and 17% Capex), and
- Cable & other subscription programming (4% projects and 5% Capex).



Source: FDI Intelligence, 2015

The figure below is a breakdown of FDI activity in the film sector from 2003 to June 2015, by business activity. The top business activities in terms of FDI projects initiated were:

- Sales, marketing and support (47% projects and 11% Capex),
- Manufacturing (17% projects and 46% Capex),
- Design, development and testing (10% projects and 25% Capex), and
- Business services (7% projects and 1% Capex).



Source: FDI Intelligence, 2015

The table below provides a list of the top ten companies in the film sector, by FDI the number of projects in which the company invested across the globe.

TOP 10 INVESTING COMPANIES INVESTING IN THE FILM SECTOR, 2003-JUNE 2015				
RANK	**INVESTING COMPANY**	**SOURCE MARKET**	**PROJECTS**	**CAPEX (ZARm)**
1	Sony	Japan	41	15 101
2	Panasonic (Matsushita)	Japan	31	7 402
3	Samsung Electronics	South Korea	30	10 341
4	LG Electronics	South Korea	25	26 742
5	Aljazeera (Al Jazeera)	Qatar	21	1 653
6	Canon	Japan	20	17 457
7	Harman International Industries	United States	19	5 605
8	DirecTV	United States	18	8 591
9	Bloomberg	United States	16	1 469
10	Endemol Shine Group	United States	14	2 389
TOTAL			**2 130**	**530 107**

Source: FDI Intelligence, 2015

3.2 South African and Western Cape FDI

3.2.1 Inward FDI

South Africa received investments worth ZAR2.3bn into its film sector from 2003 to June 2015. The top province attracting FDI projects was Gauteng, attracting seven projects in the audio and video equipment sub-sector, followed by the Western Cape, attracting three projects in this period, both located in Cape Town.

INWARD FDION INTO SOUTH AFRICA'S FILM SECTOR, 2003-JUNE 2015						
DATE	INVESTING COMPANY	SOURCE COUNTRY	DESTINATION STATE	SUB-SECTOR	CAPEX (ZARm)	JOBS
Oct 2014	Milk & Honey Films	United States	Western Cape	Motion picture & sound recording industries	87.9	16
May 2014	Anadolu Ajansi (Anatolian Agency)	Turkey	Not Specified	Radio & TV broadcasting	87.9	16
Sep 2013	British Broadcasting Corporation (BBC)	UK	Gauteng	Radio & TV broadcasting	32.8	24
Dec 2012	Extron Electronics	United States	Gauteng	Audio & video equipment	34.0	11
May 2012	Fujifilm	Japan	Gauteng	Audio & video equipment	35.2	46
May 2012	Christie Digital Systems	Japan	Gauteng	Audio & video equipment	34.0	11
Nov 2011	LG Electronics	South Korea	Gauteng	Audio & video equipment	93.7	110
Sep 2011	Geutebruck	Germany	Gauteng	Audio & video equipment	34.0	11
Sep 2007	Off The Fence	Netherlands	Western Cape	Radio & TV broadcasting	32.8	24
Nov 2005	Al Jazeera International	Qatar	Gauteng	Radio & TV broadcasting	4.7	2
May 2005	ADI International	United States	Not Specified	Audio & video equipment	45.7	20
Mar 2003	Condor	Netherlands	Western Cape	Motion picture & sound recording industries	1 757.6	89
TOTAL					**2 280.1**	**380**

Source: FDI Intelligence, 2015

Note: The recorded CAPEX and job values are based on FDI estimated values based on the average project size of this nature

Key details regarding investments in the Western Cape above are provided below

In 2014 - Milk & Honey Films a specialised production studio from the United States invested in Cape Town in the communications sector in a sales, marketing and support project valued at ZAR88m.

In 2007, Off the Fence (Amsterdam, Netherlands) invested in Cape Town in the communications sector in a business services project valued at ZAR33m. The Dutch broadcasting company, opened an office in Cape Town.

In 2003, Condor (Amsterdam, Netherlands) invested in Cape Town, in the communications sector in an ICT and internet Infrastructure project valued at ZAR1.8bn. This includes a commercials and broadcast facility, featuring high speed tele-stream connections.

3.2.2 Outward FDI

South African companies initiated 7 investment projects into the global film sector worth ZAR198m from 2003 to June 2015. CNBC made the largest investment from South Africa worth ZAR165m. The African continent was the largest destination region for South Africa's investments into the film sector.

OUTWARD FDI IN THE FILM SECTOR FROM SOUTH AFRICA, 2003-JUNE 2015								
DATE	INVESTING COMPANY	SOURCE STATE	DESTINATION COUNTRY	SUB-SECTOR	CLUSTER	INDUSTRY ACTIVITY	CAPEX (ZARm)	JOBS
Jan-12	CNBC Africa	Gauteng	Zambia	Radio & TV broadcasting	Creative Industries	Business Services	32.8	24
Jan-12	CNBC Africa	Gauteng	Botswana	Radio & TV broadcasting	Creative Industries	Business Services	32.8	24
Jan-12	CNBC Africa	Gauteng	Ghana	Radio & TV broadcasting	Creative Industries	Business Services	32.8	24
Jan-12	CNBC Africa	Gauteng	Gabon	Radio & TV broadcasting	Creative Industries	Business Services	32.8	24
Jan-12	CNBC Africa	Gauteng	Mozambique	Radio & TV broadcasting	Creative Industries	Business Services	32.8	24
Nov-08	Transtel	Gauteng	Uganda	Audio & video equipment	Retail Trade	Retail	0.9	1
Apr-07	Primedia Unlimited	Gauteng	UAE	Radio & TV broadcasting	Creative Industries	Business Services	32.8	24
TOTAL							**197.8**	**145**

Source: FDI Intelligence, 2015

Note: The recorded CAPEX and job values are based on FDI estimated values based on the average project size of this nature

Key details regarding the investments above are provided below

In 2012, CNBC Africa, a subsidiary of Pan Africa Business Media Holdings (Johannesburg, South Africa) invested in the city of Maputo Mozambique, in the communications sector in a business services project, as part of a joint venture with Mozambique-based Televisao de MoCambique. CNBC Africa currently operates bureaus in seven countries on the continent and planned to increase this to 20 by 2014, including to Botswana, Ghana, Gabon and Mozambique.

In 2008, Transtel, a subsidiary of Neotel (Johannesburg, South Africa) invested in the city of Jinja, Uganda, in the consumer electronics sector in a retail project. Transtel invested USD80,000 (sh152m) in a new showroom on Jinja Road, Uganda, for Samsung consumer electronic products.

In 2007, Primedia Unlimited (Johannesburg, South Africa) invested in the city of Dubai, UAE in the communications sector in a business services project and has opened a branch in Dubai, UAE.

3.3 FDI Benchmarking for the film & TV sector

The film and TV industries benchmark includes companies in this industry that produce theatrical and non-theatrical motion pictures whether on film, video tape or disc for direct projection in theatres or for broadcasting on television; supporting activities such as film editing, cutting, dubbing etc.; distribution of motion pictures and other film productions to other industries; as well as motion picture or other film productions projection.

The table below shows the comparative competitiveness of Cape Town benchmarked against 15 locations in terms of a film and TV sector profile, based on both quality and cost. The location achieving the best level of competitiveness is Beijing followed by New York, London and Cape Town.

Cape Town ranks 1st on cost and ranks 16th on quality (out of 16 locations) giving it an overall rank of 4th in this study based on the cost to quality ratio (cost 50% / quality 50%). Cape Town performs relatively better on cost than quality with total costs of ZAR7.99m; making it 53% more cost effective than the study average total cost of ZAR17.16m. Cape Town has a quality score of 39.72; which is 60% below the study average quality score of 100.

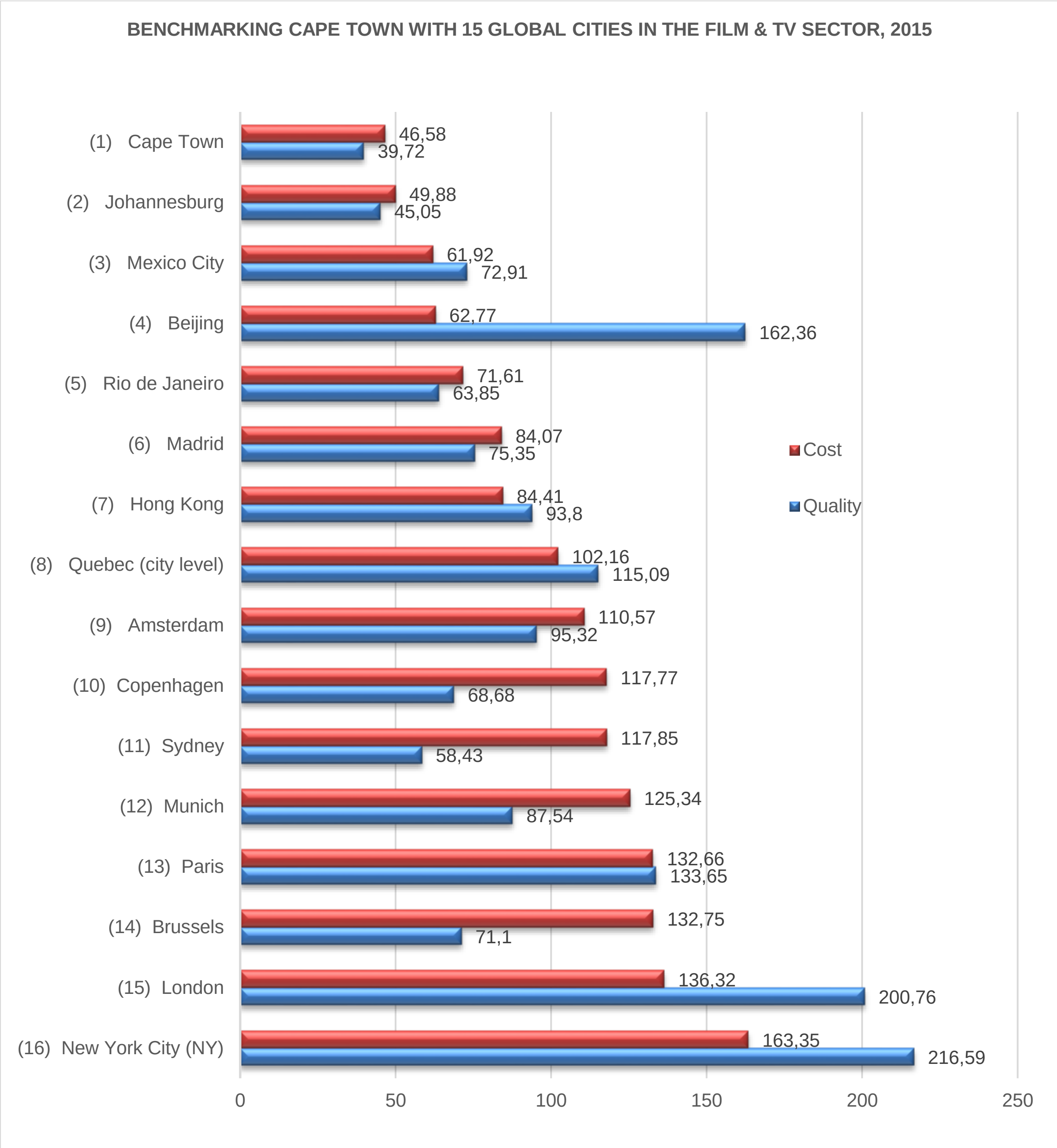
BENCHMARKING OF A FILM & TV SECTOR PROFILE IN 16 GLOBAL CITIES							
Location	Overall		Quality		Cost		
	Rank	Rating (0-100)	Rank	Score	Rank	Index	Total Cost (ZAR)
Beijing	1	100	3	162.36	4	62.77	10 770 936
New York City (NY)	2	89.63	1	216.59	16	163.35	28 026 849
London	3	87.88	2	200.76	15	136.32	23 390 294
Cape Town	4	75.31	16	39.72	1	46.58	7 991 939
Johannesburg	5	72.96	15	45.05	2	49.88	8 558 203
Mexico City	6	70.93	10	72.91	3	61.92	10 624 604
Quebec (city level)	7	66.54	5	115.09	8	102.16	17 528 913
Paris	8	66.19	4	133.65	13	132.66	22 761 707
Hong Kong	9	65.42	7	93.8	7	84.41	14 482 972
Rio de Janeiro	10	61.6	13	63.85	5	71.61	12 287 082
Madrid	11	59.44	9	75.35	6	84.07	14 424 039
Amsterdam	12	57.82	6	95.32	9	110.57	18 972 085
Munich	13	52.15	8	87.54	12	125.34	21 505 544
Copenhagen	14	47.37	12	68.68	10	117.77	20 206 361
Brussels	15	45.4	11	71.1	14	132.75	22 777 418
Sydney	16	43.95	14	58.43	11	117.85	20 220 080

Source: FDI Intelligence, 2015

**The Quality score overall covers: General business environment; Industry Cluster; Infrastructure & accessibility; Labour availability & Quality and Living environment*

** The Cost score overall covers: Operating costs, Labour costs, Utility costs and Property costs*

The chart below shows the comparative competitiveness of all 16 locations, in terms of a film and TV sector profile, based on both quality score and cost index. The figure indicates that Cape Town has the lowest cost among 16 locations in terms of a film and TV sector profile.



Source: FDI Intelligence, 2015

3.4 South Africa's Film Sector Incentives

The South African Government offers a package of incentives to promote its film production and post-production industry. The incentives consist of the Foreign Film and Television Production and Post-Production incentive to attract foreign-based film productions to shoot on location in South Africa and conduct post-production activities, and the South African Film and Television Production and Co-Production incentive, which aims to assist local film producers in the production of local content. The South African Emerging Black Filmmakers incentive, a sub-programme of the South African Film and Television Production and Co-production Incentive, aims to assist local emerging black filmmakers to nurture and grow them to take up big productions and thus contribute towards employment creation.

A list of South Africa's film incentives are shown below:

SELECTED INCENTIVES FOR SOUTH AFRICA'S FILM SECTOR 2013			
INCENTIVE	**OBJECTIVE**	**APPLICABILITY**	**BENEFIT**
(ECA) Location film and television production incentive	To encourage and attract large budget films and television productions that will contribute towards South Africa's economic development and international profile and increase foreign direct investment.	Foreign-owned qualifying productions with Qualifying South African Production Expenditure (QSAPE) of ZAR12 million and above.	Rebate of 15% of the QSAPE to qualifying productions.
(ECA) South African film and television production and co-production incentive. (Note: Apply before commencing principal photography)	To support the local film industry and to contribute towards employment opportunities in South Africa.	The incentive is available to qualifying South African productions and official treaty co-productions with a total Special Purpose Corporate Vehicle (SPCV) incorporated in the Republic of South Africa solely for the purpose of the production of the film or television project. The SPCV and the parent company(ies) must have a majority of South African shareholders, of whom at least one must play an active role in the production and be credited in that role. An applicant must be the entity responsible for all activities involved in the production of the film in South Africa and must have access to full financial information for the whole production worldwide. Only one entity per production is eligible for the incentive. Production of R2.5 million and above.	The incentive is calculated as 35% of the first R6 million of QSAPE and 25% of the QSAPE on amounts above R6 million.
South African Film and Television Production and Co-Production Incentive	To support the local film industry and contribute towards employment opportunities in South Africa.	SPCV incorporated in the Republic of South Africa solely for the purpose of the production of the film or television project. The SPCV and parent company(ies) must have a majority of South African shareholders of whom at least one shareholder must play an active role in the production and be credited in that role. An applicant must be the entity responsible for all activities involved in making the production in South Africa and must have access to full financial information for the whole production; Only one film production, television drama or documentary series per entity is eligible for the incentive. The following formats are eligible: feature films, tele-movies, television drama series, documentaries and animation. The incentive is available only to qualifying South African productions and official treaty co-productions with a total production budget of R2.5million and above.	The rebate is calculated as 35% of the first R6 million of QSAPE and 25% of the QSAPE on amounts above R6 million.
The South African Emerging Black Filmmakers Incentive	The South African Emerging Black Filmmakers Incentive is available to South African black-owned qualifying productions. Key objectives: To nurture and capacitate emerging black	South African black-owned qualifying productions with a total production budget of R1 million and above. An applicant must be a registered SPCV incorporated in the Republic of South Africa solely for the purpose of the production of the film or television project.	A rebate of up to 50% for the first R6 million of the QSAPE and 25% thereafter. No cap is applicable for this rebate.

SELECTED INCENTIVES FOR SOUTH AFRICA'S FILM SECTOR 2013			
INCENTIVE	**OBJECTIVE**	**APPLICABILITY**	**BENEFIT**
	filmmakers to take up big productions and contribute towards employment opportunities.	Have been in existence, operational and involved in the fi lm industry for at least six months, with at least a 10-minute trailblazer or short fi lm produced. The holding/service company(ies) must have at least 65% South African black shareholders and the SPCV at least 75% South African black shareholders, of which the majority must play an active role in the production and be credited in that role. An applicant must be the entity responsible for all the activities in the making of the production and must have access to full financial information for the entire production. Both the applicant SPCV and holding/service company (ies) must comply with the requirements for B-BBEE as issued in the Government Gazette of 11 October 2013 in terms of the Codes of Good Practice. Both the applicant SPCV and holding/service company(ies) must achieve at least a level three B-BBEE contribution status in terms of the B-BBEE Codes of Good Practice. Both the applicant SPCV and holding/service company (ies) must submit a valid B-BBEE certificate issued by an accredited verification agency at application stage. Only one fi lm production, television drama or documentary series per entity per application is eligible for the incentive.	
(ECA) Film rebate subsidies	To provide tax exemptions to investor-owner film producers.	Investor-owner film producers	Tax exemptions to be granted to investor-owner film producers.
Foreign Film and Television Production and Post-Production Incentive Note: Apply before commencing principal photography or conducting on-line post production.	The Foreign Film and Television Production and Post-Production Incentive aims to attract foreign-based film productions to shoot on location in South Africa and conduct post-production activities in the country. The South African Film and Television Production and Co-Production incentive aims to assist local film producers in the production of local content.	Foreign-owned qualifying productions with a minimum of Qualifying South African Production Expenditure (QSAPE) of R12 million and above, provided that at least 50% of principal photography is done in South Africa, for a minimum of four weeks; An applicant must be a Special Purpose Corporate Vehicle (SPCV) incorporated in the Republic of South Africa solely for the purpose of the production of the film or television or post-production project. An applicant must be the entity responsible for all activities involved in the making of the production in South Africa and must have access to full financial information for the whole production worldwide; and only one entity per production is eligible for the incentive.	**Benefits (production only)** 20% of QSAPE Minimum running time is 80 minutes No capped amount for the grant **Benefits (production and post-production)** Shooting on location in South Africa and conducting post-production with Qualifying South African Post-Production Expenditure (QSAPPE) of R1.5 million in the country, the incentive will be calculated at 22,5% of QSAPE and QSAPPE (additional 2,5%). Shooting on location in South Africa and conducting post-production with a QSAPPE of R3 million and above in South Africa, the incentive will be calculated as 25% of QSAPE and QSAPPE (an additional 5% will be added). **Benefits (post-production only)** Foreign post-production with QSAPPE of R1.5 million, the incentive is calculated at 22,5% of QSAPPE. Foreign post-production with QSAPPE of R3 million and above, the incentive is calculated at 25% of QSAPPE. Minimum of two weeks. If 100% of post-production is conducted in South Africa, the minimum requirement for number of weeks will be waived.

SELECTED INCENTIVES FOR SOUTH AFRICA'S FILM SECTOR 2013			
INCENTIVE	**OBJECTIVE**	**APPLICABILITY**	**BENEFIT**
Tax Incentive: 120 of Income Tax Grant	The South African Revenue Service introduced Section 120 of the Income Tax Act in 2012, which provides for an incentive in the form of a tax allowance to stimulate film production.	In order to qualify for the tax allowance, taxpayers must meet the following criteria: • Income must be derived from a film • The film must be approved as a local film or co-production • Income must be allocable to the initial investors • Income must be derived from exploitation of rights • Income must fall within a 10 year period	Provides for an incentive in the form of a tax allowance to stimulate film production.
National Film and Video Foundation	The National Film and Video Foundation (NFVF) helps the industry access funds, promotes the development of South African film and television audiences, develops talent and skills in the country – with a special emphasis on previously disadvantaged groups – and helps filmmakers represent and market their work internationally.	It supports South African-owned production companies, and prioritises projects or organisations of national importance and proposals that contain local content and have empowerment or training components.	The NFVF offers funding for the production of films and documentaries through repayable loans or grants. It also funds education and training through various bursaries; awards development funding; and supports applications for marketing and distribution funds, allowing independent producers and distributor's access to test screenings and film launches.
Industrial Development Corporation	A state-owned development financing institution, the Industrial Development Corporation (IDC) seeks to create a sustainable local film industry.	-	The IDC's Media and Motion Pictures Strategic Business Unit funds film, broadcasting and post-production projects. Assistance is usually in the form of loan finance, and it will not fund more than 49% of a project.

Source: DTI 2015, NFVF 2015, South Africa Info 2013

**Incentives are subject to change. Please visit the department of trade and industry website for additional information: www.thedti.gov.za*

APPENDIX 1: KEY PLAYERS IN WESTERN CAPE'S FILM & TELEVISION COMMERCIAL PRODUCTION

KEY PLAYERS IN THE WESTERN CAPE'S FILM SECTOR, 2015			
COMPANY	PROFILE	CITY	WEBSITE
Do Productions	Boutique and relationship orientated company specializing in the independent television and feature film market.	Cape Town	www.doproductions.com
Penguin Films	Premiere television and film production companies in South Africa & is level 1 BEE compliant. Achieved success in the fields of long form television drama, documentary, sitcom, edutainment, talk shows, feature films, commercials, corporate & training videos and children's programming.	Cape Town	www.penguinfilms.co.za
Cape Town Film Studios	Cape Town Film Studios is the first custom built Hollywood style film studio complex of its kind in Africa, with state of the art support services	Cape Town	www.capetownfilmstudios.co.za
Film Afrika	One of Africa's premier production companies and South Africa's most prolific producer and co-producer of films for the international market	Cape Town	www.filmafrika.com
Trigger Fish Animation Studio	Triggerfish is a Cape Town-based media and entertainment company passionate about producing original character-driven stories with universal appeal. Running DTi supported incubator Story Lab with Disney.	Cape Town	triggerfishstudios.com
Moonlighting Film production services	One of the premier production companies in Southern Africa for production services, co-productions and structured financing with over 20 years experience.	Cape Town	www.moonlighting.co.za
Okuhle Media	Award winning media and production company. Some key projects include Signal High Season 2, Kasio-Licious, Hectic Nine 9, Glitterboys & Ganglands, My Night Reality Series.	Cape Town	www.okuhle.co.za
Out of Africa Entertainment	Production company able to provide hands on approach. Some key movies include Wild at Heart, The Pensioner, Strike Back.	Cape Town	www.outofafrica.info
Street Stories Films	Company broadcasting four seasons of street Talk in Western Cape, Eastern Cape and DStv.	Cape Town	www.streettalktv.com
Two Oceans Production	TOP have produced more than 60 movies for the German speaking market, both TV and features.	Cape Town	www.topproduction.de
Waterfront Film Studios	TV series, Staging, Post Production, Visual Effects.	Cape Town	hwww.waterfrontfilmstudios.com
Zen HQ Films	ZenHQ Films is a leading film and television production company based in Cape Town, with offices in Los Angeles.	Cape Town	www.zen-hq.com
Light and Dark Films	Light & Dark films is an international award winning production company specialising in high end films for the international market.	Cape Town	www.lightanddarkfilms.com
Off The Ground	The OTG team has vast experience writing, directing and producing television, radio, print and web material.	Cape Town	offtheground.co.za
Spier Films	Spier Films is an award-winning production and finance company with offices in Cape Town, London and Reykjavik. Create and support films which have both critical and commercial success and often work with highly respected international producers in both a servicing and co-production capacity while remaining dedicated to fostering South African talent.	Cape Town	www.spierfilms.com
7 Films	Services offered are TVC, Stills & Locations.	Cape Town	www.7films.co.za
AFS Productions	Serve the needs of the international commercial, stills and film industry wanting to shoot in Africa.	Cape Town	www.afsproductions.com
Atomik Pictures	Atomik Pictures is a boutique service production company that works with partners across the globe within the film industry.	Cape Town	www.atomikpictures.com
Bang Bang Films	Bang Bang films and advertising; includes all aspects of television commercials, photographic stills campaigns, documentaries and music videos.	Cape Town	www.bangbangfilms.com
Black Ginger	BlackGinger is a multi-award winning talent driven animation and visual effects studio based in cape town, South Africa, servicing commercial, series and film clients locally and internationally	Cape Town	www.blackginger.tv
Bird Film	Offers commercials, stills, TV and features	Cape Town	www.birdfilm.com
Cap Films	Creative commercial production companies within the advertising industry	Cape Town	www.cabfilms.com
Egg Film	Film service extends to commercials, stills, documentaries and music videos.	Cape Town	eggfilms.tv
Grinder Films	Designed as a table top studio from the outset, able to tailor the studios layout, power, ventilation, and facilities to this very specialised discipline.	Cape Town	www.grinderfilms.com
Lucky Fish	The company produces and provides production service of commercials, feature films, documentaries and corporate videos in the Southern African region.	Cape Town	www.luckyfishproductions.co.za
Farm Film	The farm is a hands on production services company with experience shooting in over 15 countries and the Indian Ocean Island.	Cape Town	www.farmfilm.tv
Kalahari Pictures	A leading Cape Town production company, offering production services for films, TV series and commercials shooting in Africa	Cape Town	www.kalaharipictures.com
Man makes a Picture	Production house specialising in documentaries and television	Cape Town	www.manmakesapicture.co.za

KEY PLAYERS IN THE WESTERN CAPE'S FILM SECTOR, 2015			
COMPANY	**PROFILE**	**CITY**	**WEBSITE**
e.tv	Filmed content across the production spectrum from cinema and television to mobile and internet distribution platforms		www.etv.co.za
Metal Tiger Productions	A streamlined production company offering huge experience without the expensive frills	Cape Town	www.metaltigersproductions.co.za
TH Films	We provide a wide range of creative services including: Documentaries Feature Films, Commercials, short Films, Music Videos, PSA's, Corporate videos	Cape Town	www.thfilms.net
Gambit Films	Gambit Films was founded in 2009 when a group of passionate, qualified film makers formed a multimedia agency that focuses on creating, developing and producing new and innovative intellectual property for Commercials, Film and Television.	Cape Town	www.gambitfma.co.za

Source: Commercial Producers Association of South Africa, 2015 & Independent Producers Organisation, 2015, Callsheet, 2015

**Please note that this list by no means covers all the vibrant film production companies currently working in South Africa. Please contact the associations listed below for additional companies.*

APPENDIX 2: KEY ASSOCIATIONS IN SOUTH AFRICA'S FILM SECTOR

LIST OF KEY ASSOCIATIONS IN SOUTH AFRICA'S FILM SECTOR, 2015		
COMPANY	**PROFILE**	**WEBSITE**
Commercial Producers Association of South Africa (CPA)	The CPA is a professional trade association of film companies specializing in the production of television commercials.	www.cpasa.tv
The Independent Producers Organisation (IPO)	The IPO is a representative, national organisation of independent South African film, television and video producers constituted to represent, protect and promote the interests and needs of producers.	www.ipo.org.za
The Documentary Film Makers Association (DFA)	The DFA was established to nurture and develop the interests of documentary filmmakers in South Africa.	www.docfilmsa.com
Animations South Africa (ASA)	The ASA is the representative and legitimate industry body for animation in South Africa.	www.animationsa.org
South African Association of Stills Producers (SAASP)	The SAASP committed itself to promote the best standards, practices and qualifying criteria based on international norms. SAASP holds this up as an example of best practice management for Production Companies throughout South Africa	www.saasp.co.za
National Association of Model Agencies (NAMA)	NAMA stands for the National Association of Model Agencies also incorporating Children's, Character, Talent and Creative Agencies in South Africa. Its Members represent Models, Characters, Children, Talent and Artists appearing in Advertising in all media in South Africa as well as the International market.	www.nama.co.za
South African Screen Federation (SASFED)	The SASFED is the national federation of independent film, television and audio-visual content industry organisations in South Africa.	www.sasfed.org
Writers' Guild of South Africa (WGSA)	Whose vision is to be a self-sustainable and united guild representing the collective interests of all South African performance writers.	www.writersguildsa.org
Interactive Entertainment SA (IESA)	IESA is an industry body representing the interactive entertainment industry in South Africa.	www.iesa.org.za
Make Games South Africa	Representing all game makers of South Africa including hobbyist.	www.makegamessa.com
South African Guild of Editors	The South African Guild of Editors is a voluntary, non-profit organisation which represents film and video picture editors, assistant editors and sound editors.	www.editorsguildsa.org
Personal Managers' Association	The PMA or Personal Managers' Association was founded in 1980 and is an Association that was formed to assist and further the best interests of its members in their endeavours to promote and manage the facilitation of opportunities and contracts for their clients.	www.thepma.co.za

Source: Various internet sources, 2015

The Western Cape is a region of unlimited potential. And this translates into unlimited opportunity. Whether you're interested in film, travel, export or investment, Cape Town and the Western Cape has something for you. Wesgro, the government agency that promotes the economy of Cape Town and the Western Cape wants to help you uncover these opportunities.

Wesgro holds the film and media promotion mandate for Cape Town and the Western Cape. Our Film and Media Promotion unit offers the following services:

- Assists local and international film companies looking to do production in the Western Cape
- Assists local and international film companies looking to find distribution and co-production parties
- Hosts B2B sessions, Exporter Development Programmes and Masterclasses
- Offers policy and regulatory guidance
- Communicates and lobbies with regional and national regulatory and professional bodies
- Project mentoring
- Investment advice
- Marketing

For more information on this publication and other Wesgro publications please contact research@wesgro.co.za or for more publications visit the Wesgro publications portal on our website at http://wesgro.co.za/publications