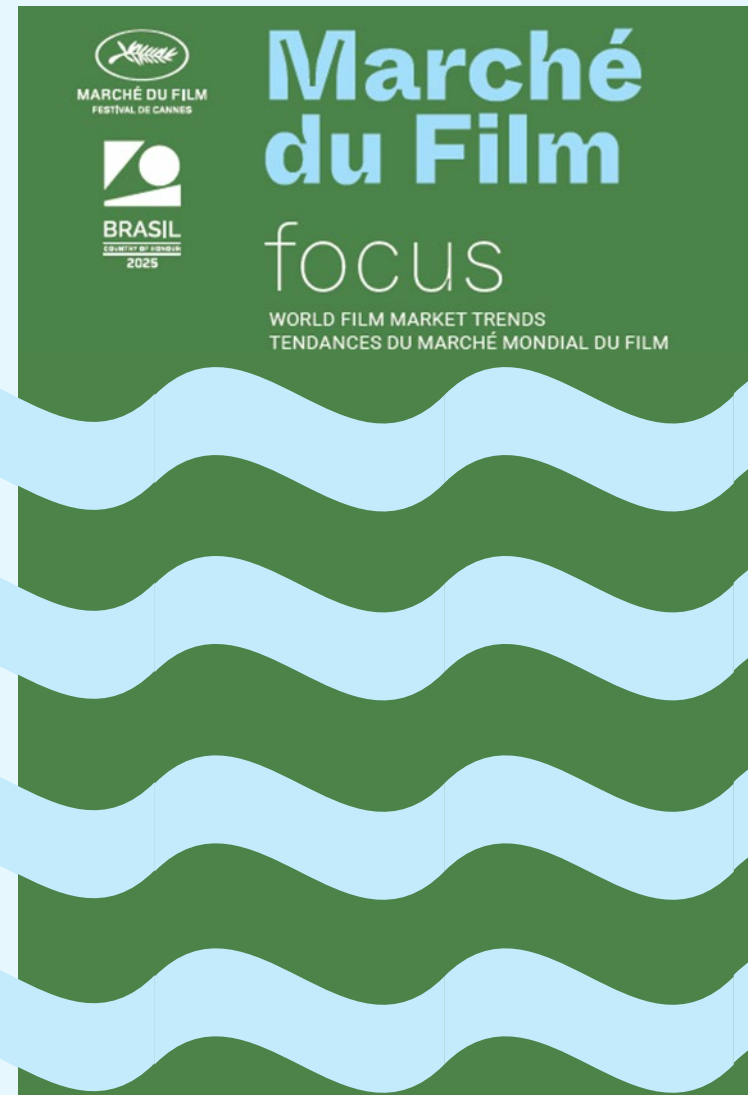


# FOCUS 2025

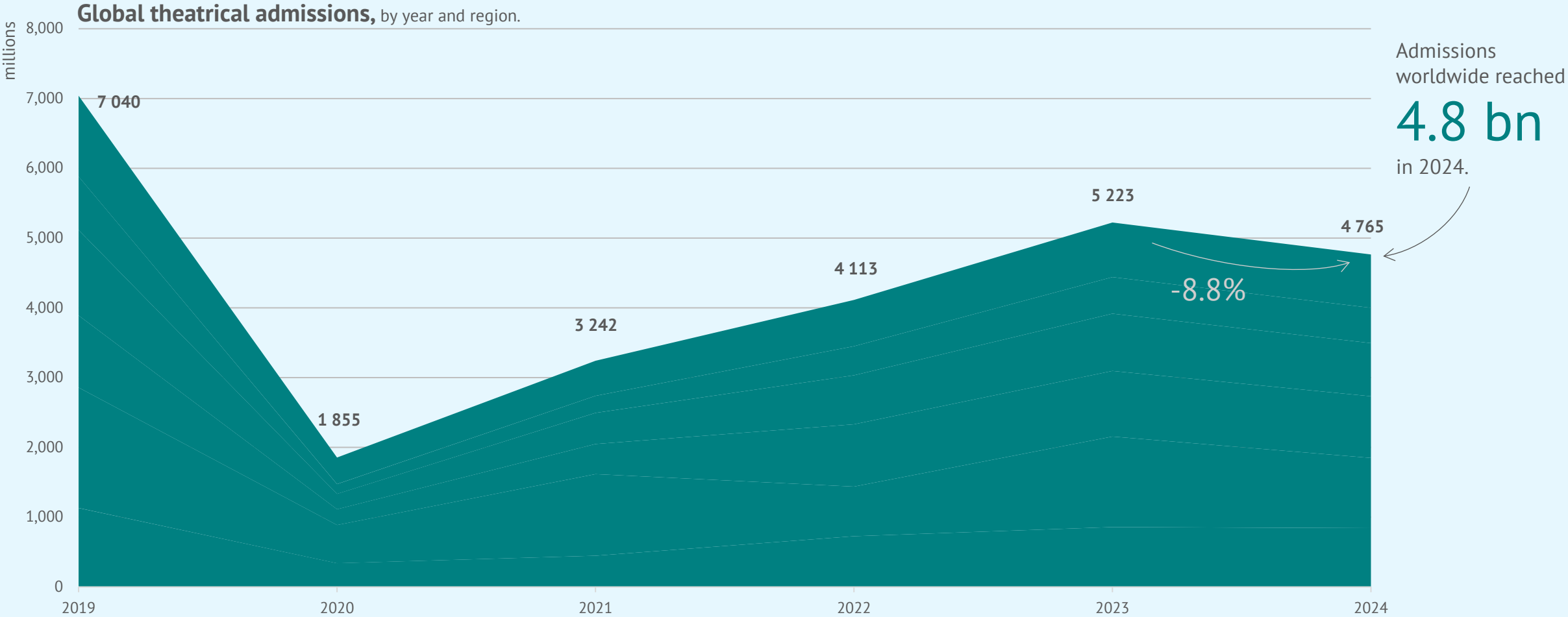
## WORLD FILM MARKET TRENDS



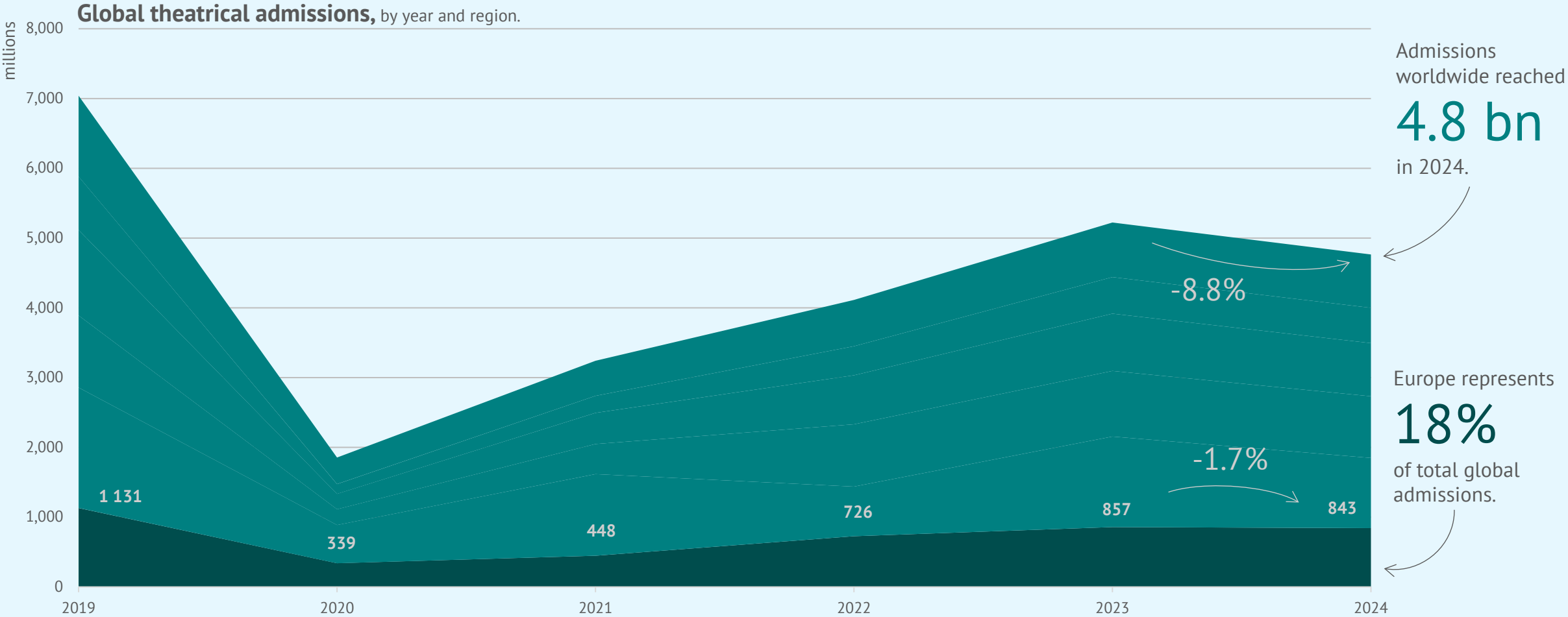


# 01 Admissions

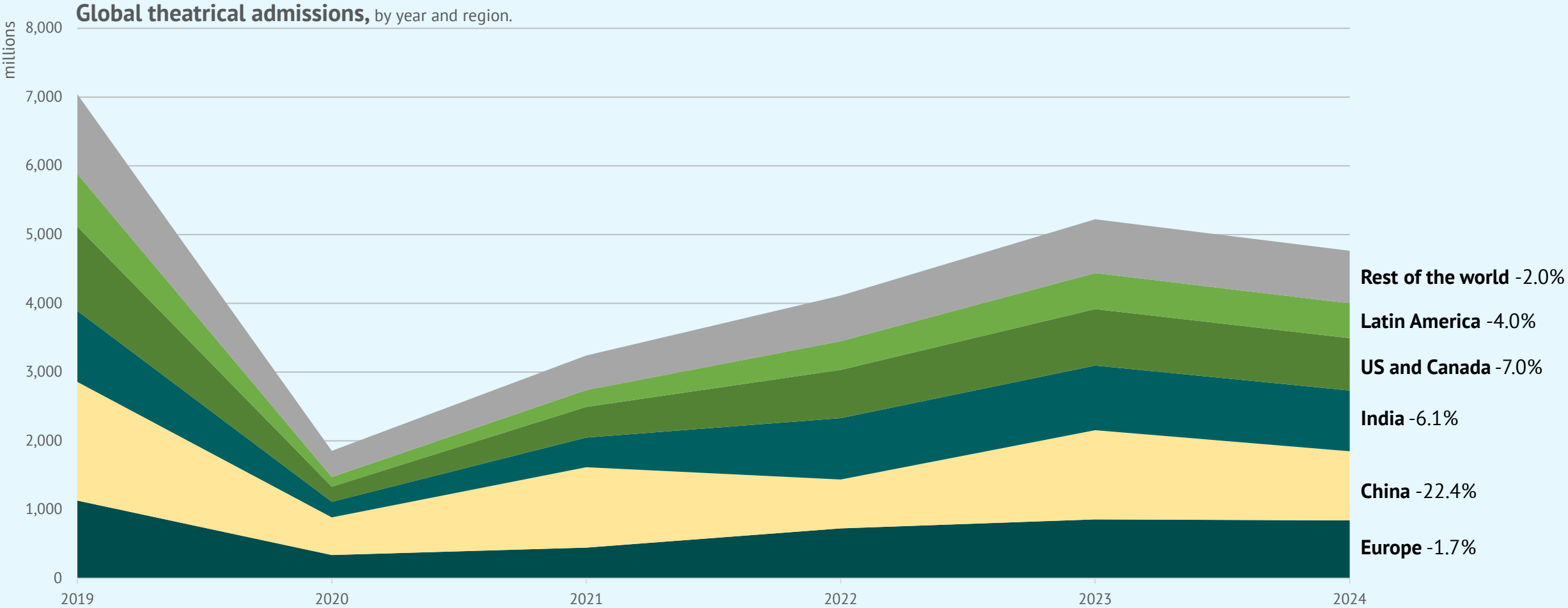
Global cinema admissions decreased 8.8% to 4.8 bn in 2024. Box office revenues reached EUR 28 bn.



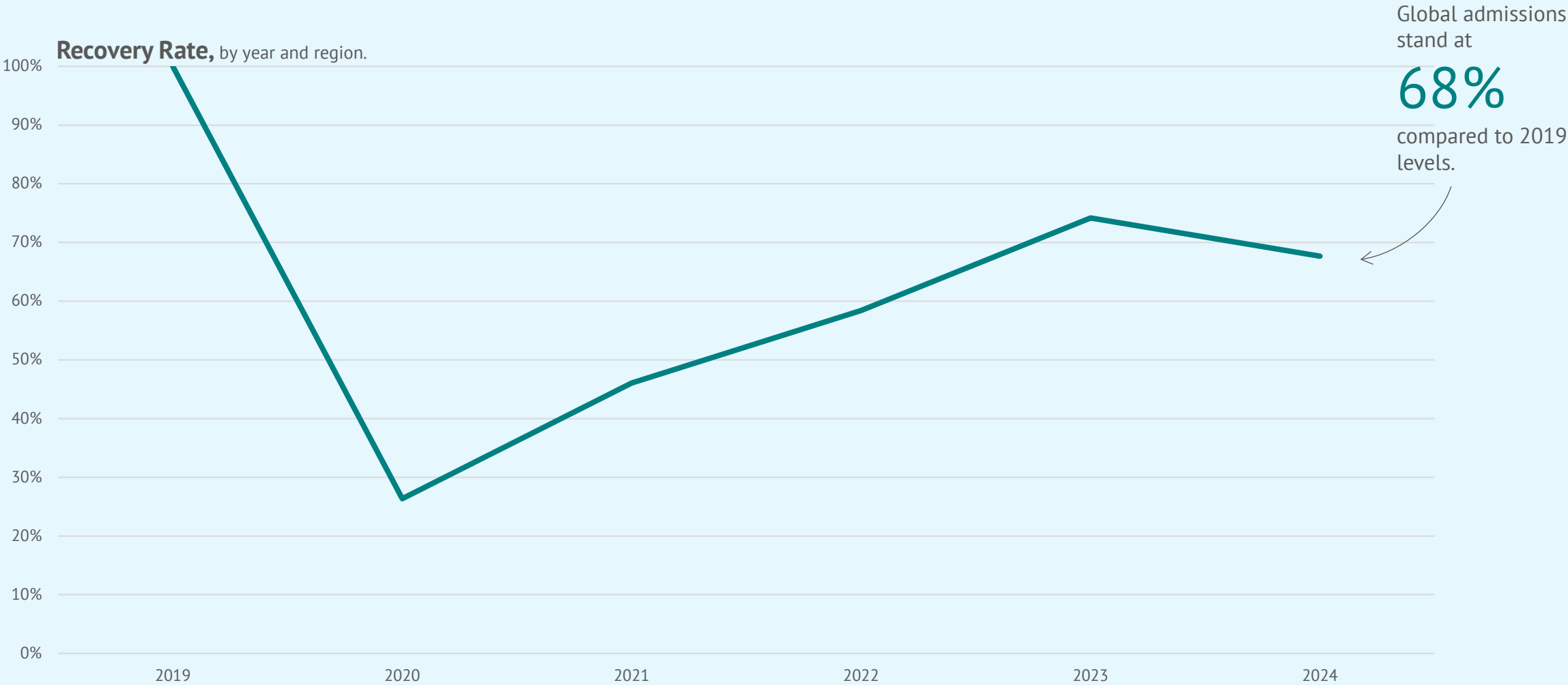
Helped by local productions, cinemas in Europe performed relatively better, reaching 843 m admissions, down only -1.7% compared to 2023.



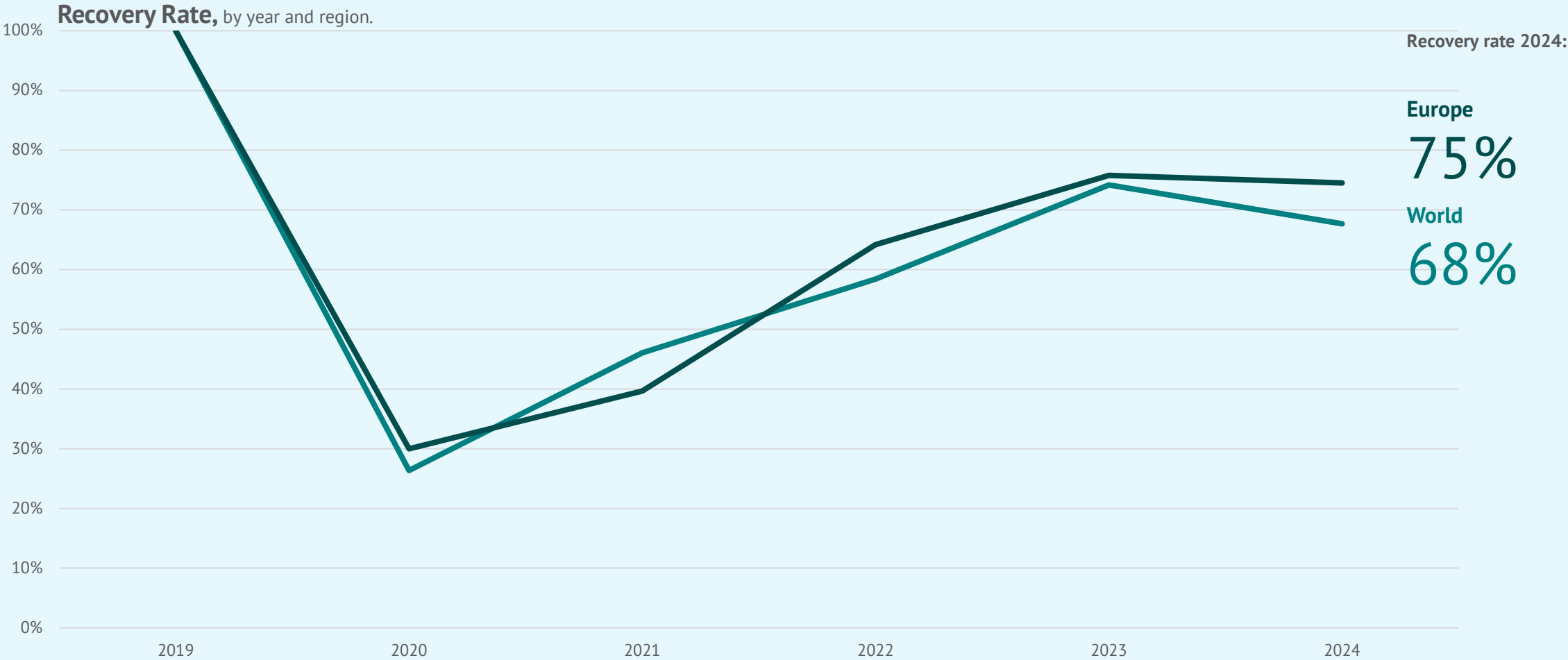
Cinema attendance was down across the globe, with China and North America counting on the strongest decreases.



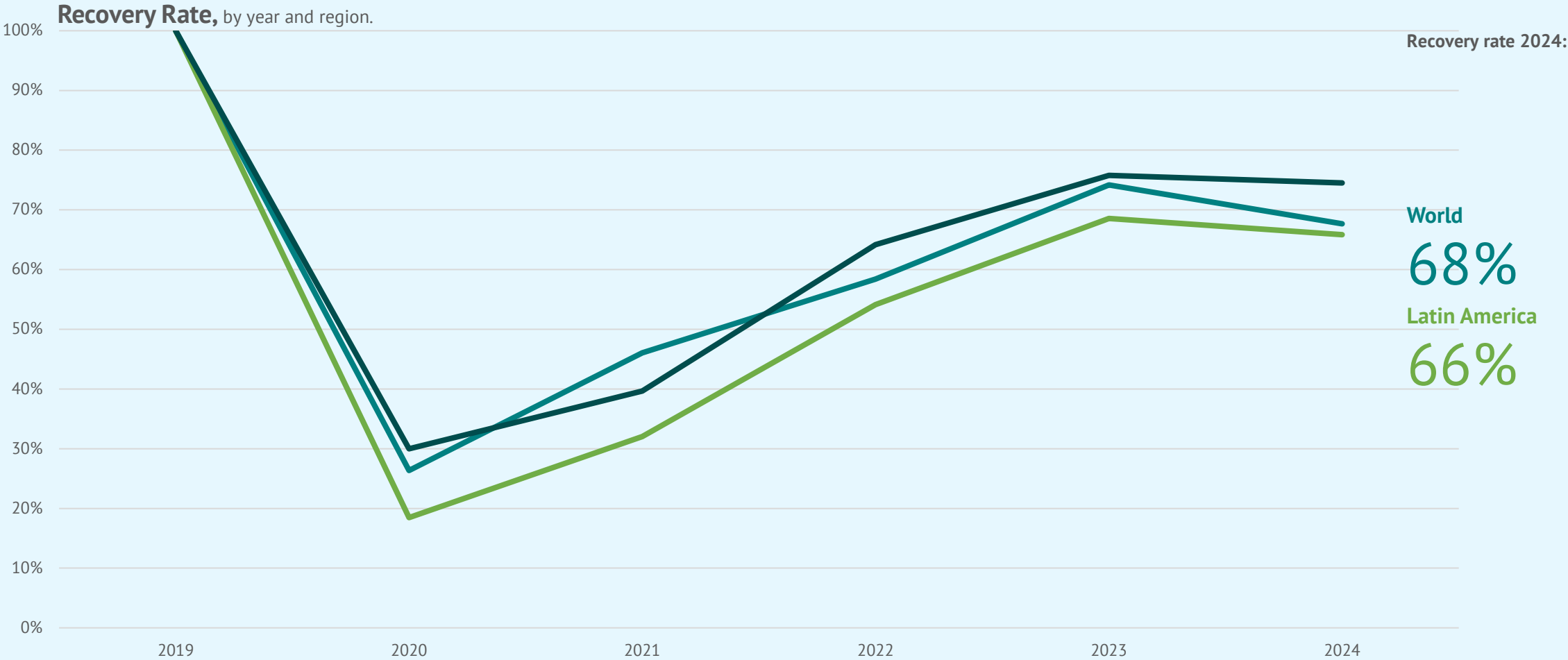
Global admissions in 2024 represented a 32% shortfall compared to 2019 figures.



Europe is performing generally better, currently at a 75% recovery rate.

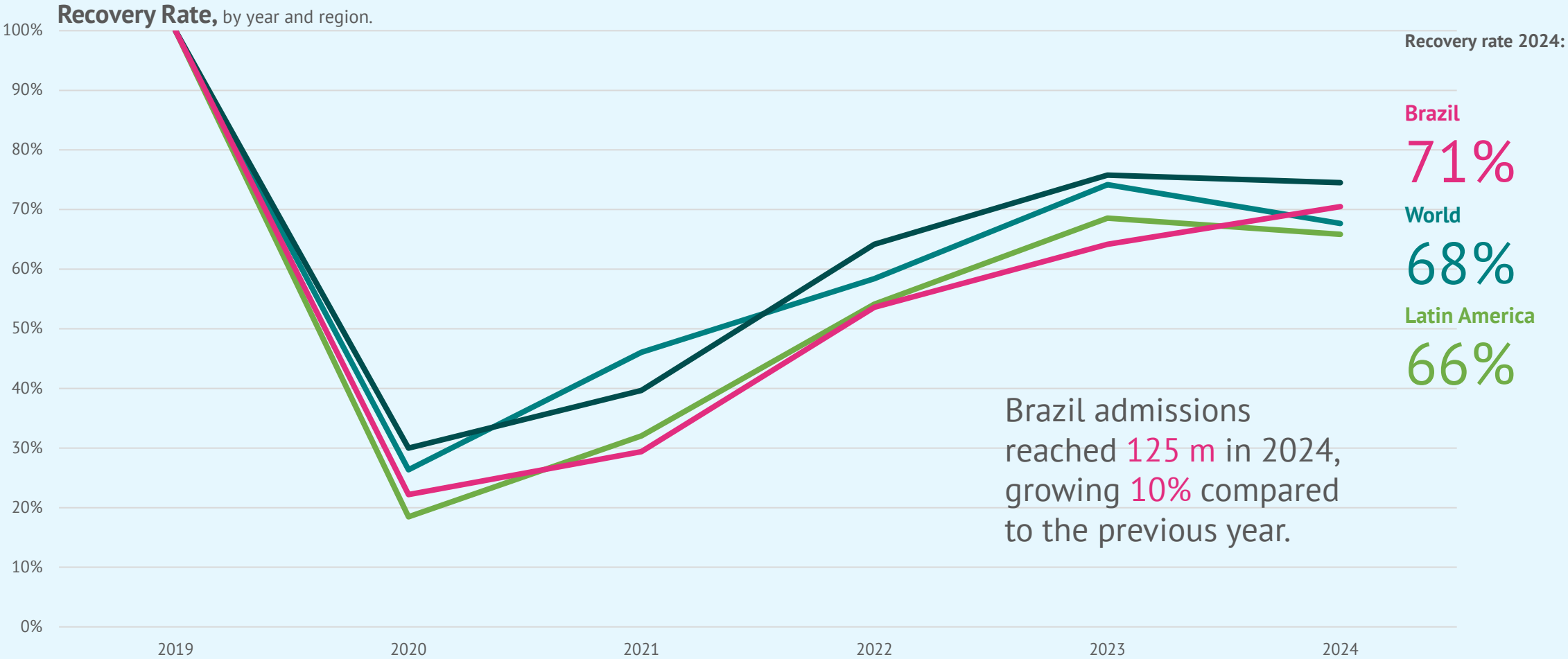


Latin America had a relatively good year, closing its gap with the global average and reaching a 66% recovery rate.





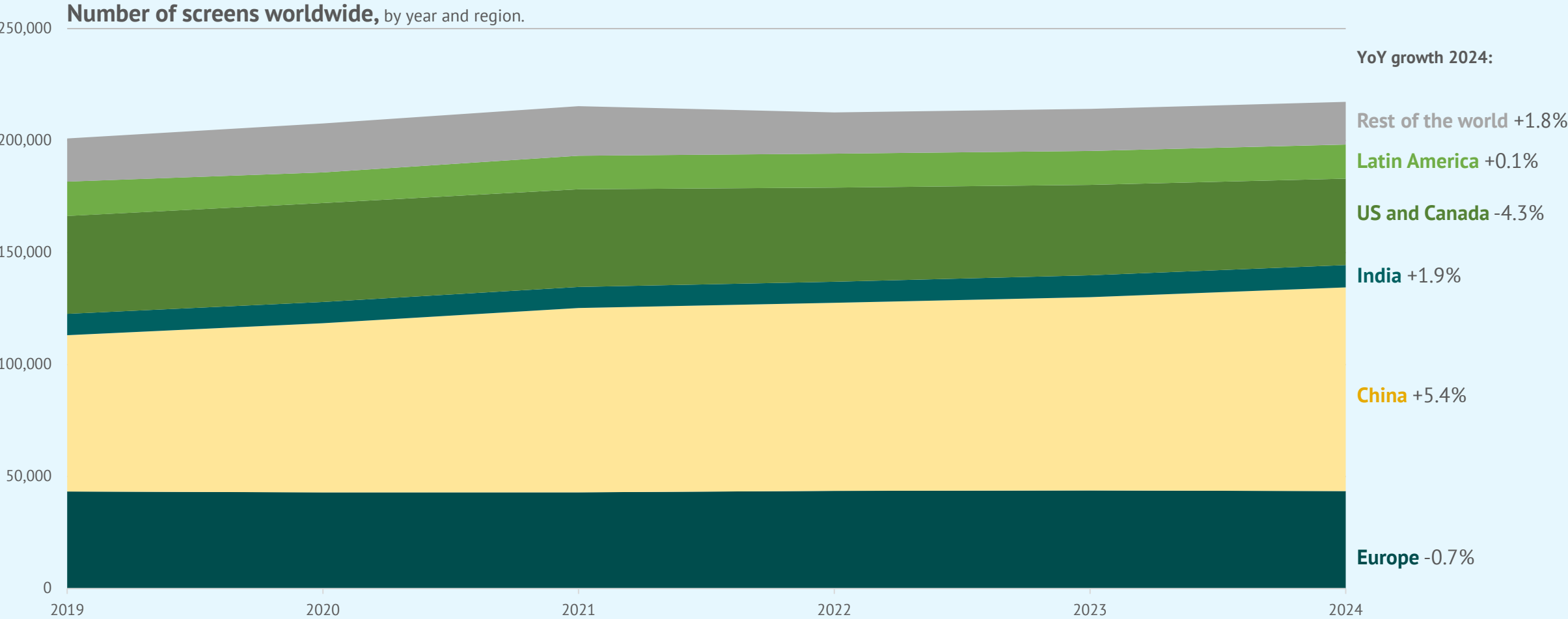
In a year when most countries saw stabilization, Brazil defied the trend with continued box office growth.



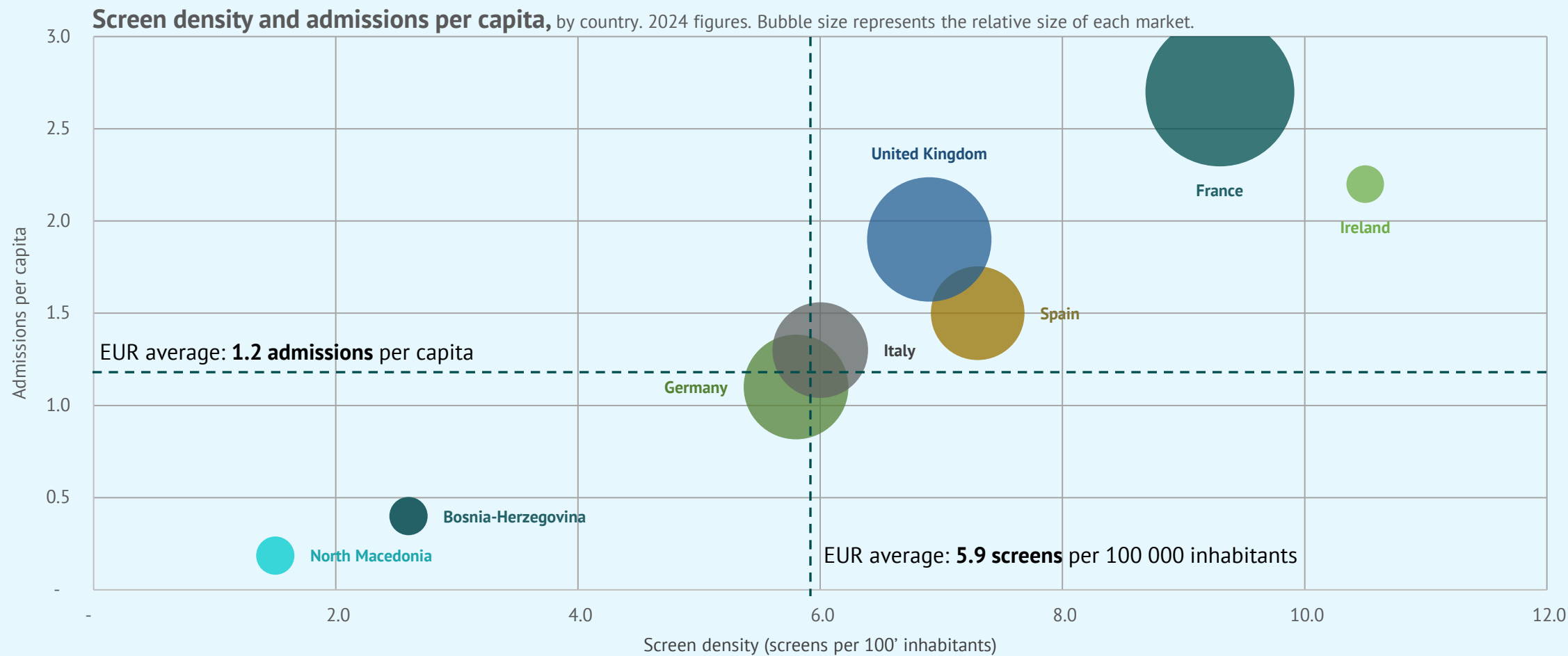


## 02 Theatrical infrastructure

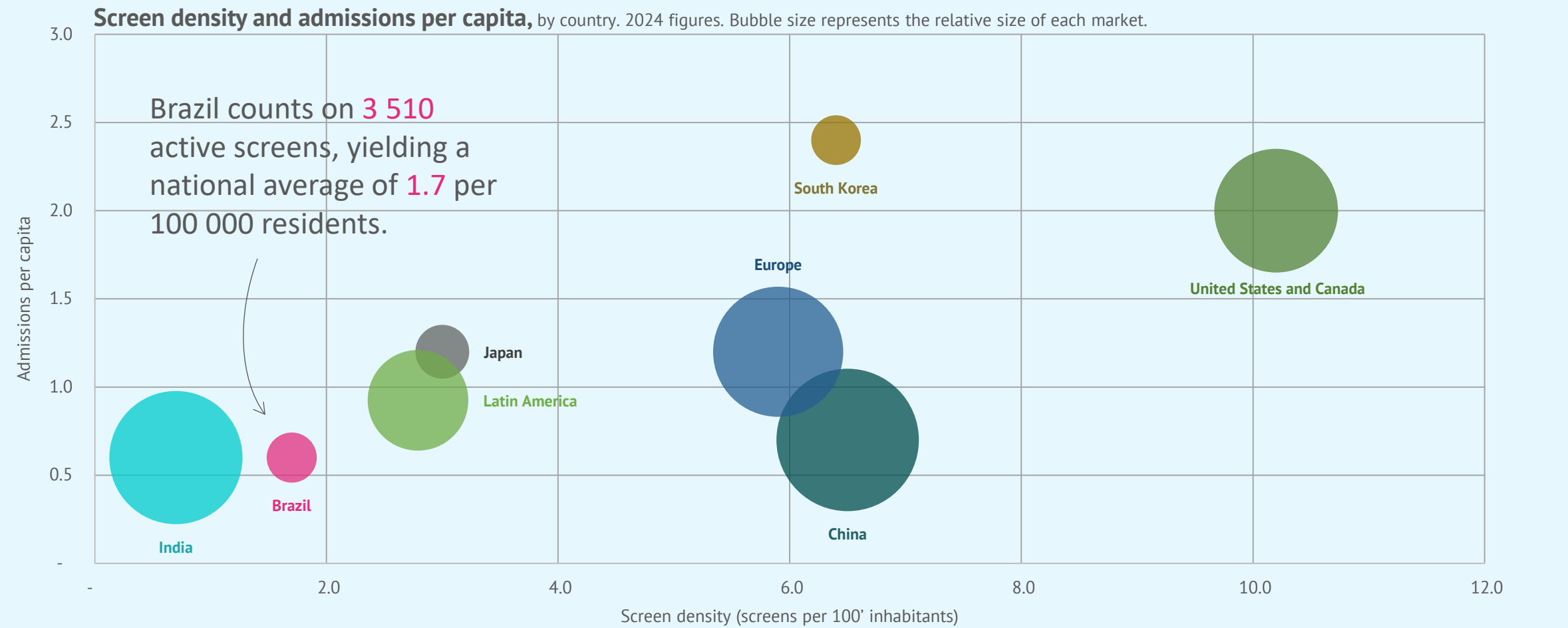
# Global screen count is on the rise, despite notable disparities between individual markets.



Screen density and admissions per capita appear to be closely linked across Europe, with France and Ireland leading in both areas.



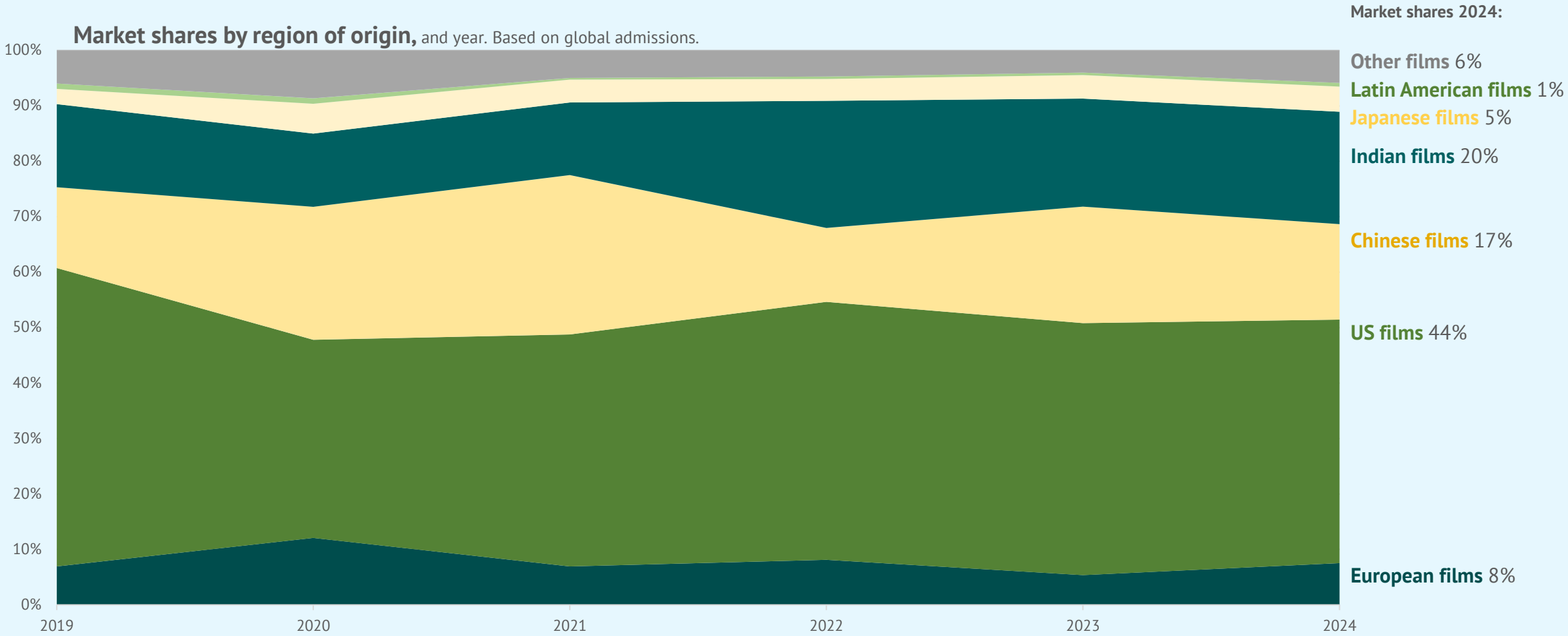
# India and Latin America maintain relatively low screen density compared to other leading global markets.



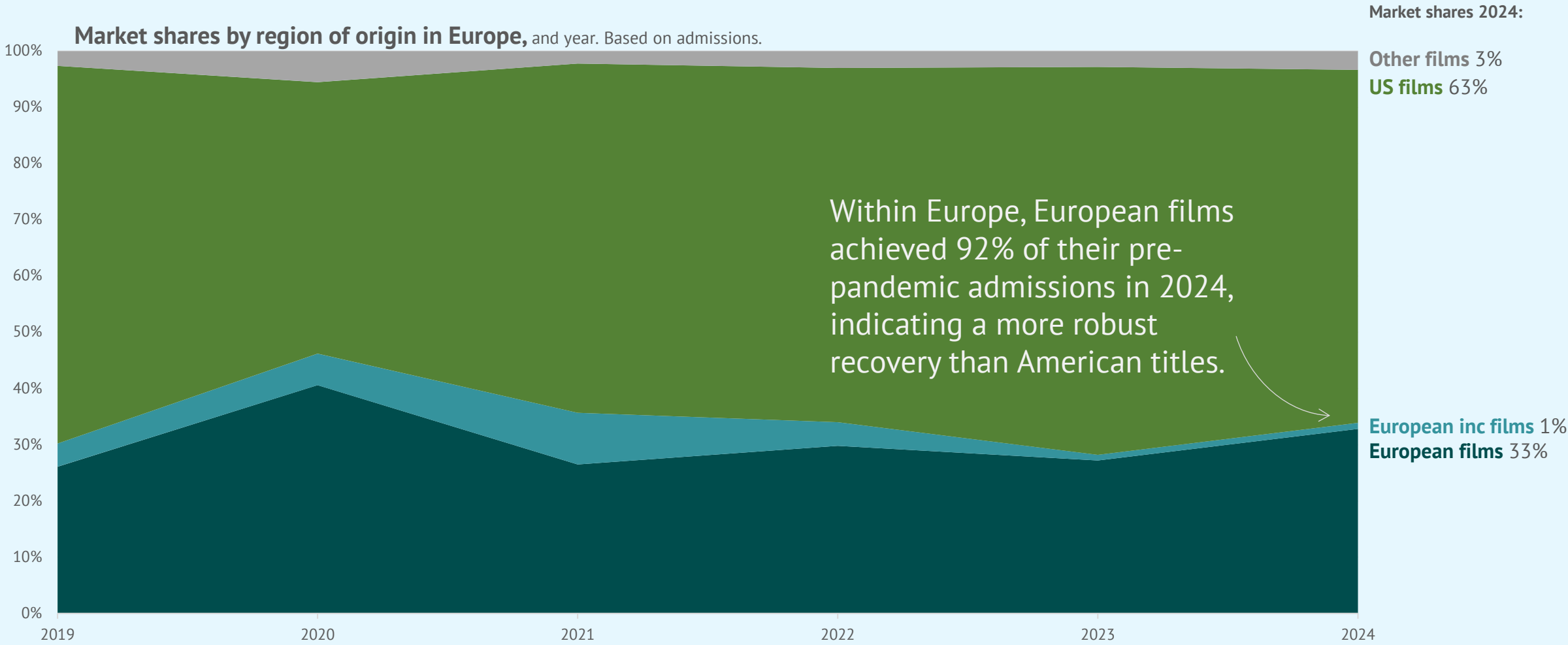


## 03 Market shares and top films

An estimated 81% of global theatrical admissions in 2024 are attributed to films produced in the United States, China, and India.























European films in Europe accounted for 33% of all admissions in 2024, the highest share in 4 years (10, excluding the atypical 2020 theatrical year).





While American films continued to dominate, two French titles managed to enter the year-end top 20 rankings.


















Top 20 films in Europe, in 2024. Ranked by total admissions.

	Title	First country of origin, director	Total admissions
1	Inside Out 2	 Kelsey Mann	50.8 m.
2	Despicable Me 4	 Chris Renaud, Patrick Delage	31.7 m.
3	Deadpool & Wolverine	 Shawn Levy	29.5 m.
4	Moana 2	 David G. Derrick Jr.	28.3 m.
5	Dune: Part Two	 Denis Villeneuve	23.5 m.
6	Gladiator II	 Ridley Scott	17.1 m.
7	Kung Fu Panda 4	 Mike Mitchell, Stephanie Stine	16.1 m.
8	Wicked	 Jon Chu	12.5 m.
9	Mufasa: The Lion King	 Barry Jenkins	12.3 m.
10	It Ends with Us	 Justin Baldoni	11.7 m.
11	Un p'tit truc en plus	 Artus	11.7 m.
12	Le Comte de Monte-Cristo	 A. de La Patellière, M. Delaporte	10.6 m.
13	Venom: the Last Dance	 Kelly Marcel	10.2 m.
14	Beetlejuice Beetlejuice	 Tim Burton	10.1 m.
15	The Wild Robot	 Chris Sanders	9.8 m.
16	Wonka	 Paul King	9.5 m.
17	Migration	 Benjamin Renner, Guylo Homsy	9.4 m.
18	Kingdom of the Planet of the Apes	 Wes Ball	8.6 m.
19	Anyone But You	 Will Gluck	8.4 m.
20	The Garfield Movie	 Mark Dindal	8.1 m.



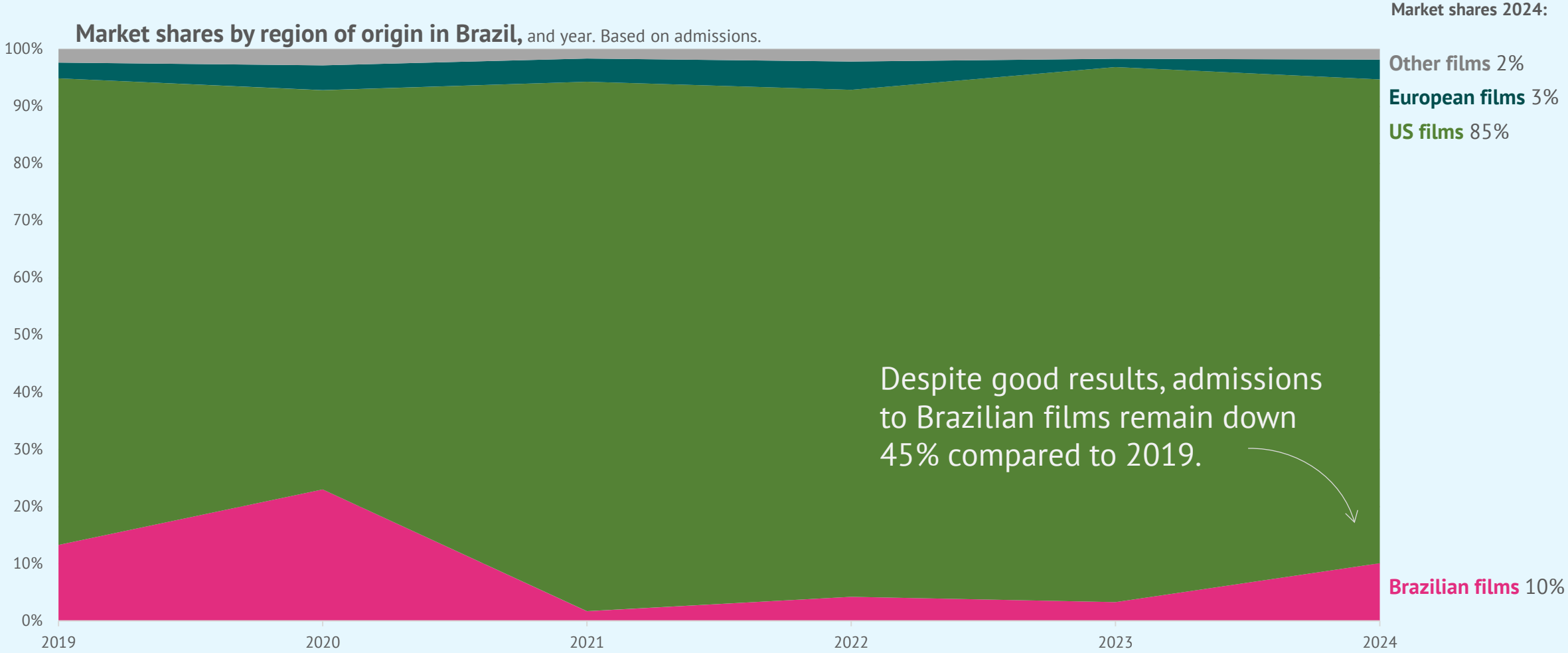
French local breakout hits and British productions together represented 9 out of the top 10 European films in Europe in 2024.

Top 20 European films in Europe, in 2024. Ranked by total admissions.

	Title	First country of origin, director	Total admissions
1	Un p'tit truc en plus	 Artus	11.7 m.
2	Le Comte de Monte-Cristo	 A. de La Patellière, M. Delaporte	10.6 m.
3	Poor Things	 Yorgos Lanthimos	6.5 m.
4	Paddington in Peru	 Dougal Wilson	5.2 m.
5	L'amour ouf	 Gilles Lellouche	5.1 m.
6	Back to Black	 Sam Taylor-Johnson	4.9 m.
7	One Life	 James Hawes	4.5 m.
8	The Zone of Interest	 Jonathan Glazer	4.2 m.
9	Conclave	 Edward Berger	3.4 m.
10	Die Schule der magischen Tiere 3	 Sven Unterwaldt Jr.	3.3 m.
11	The Substance	 Coralie Fargeat	3.3 m.
12	Chantal im Märchenland	 Bora Dagtekin	3.2 m.
13	Le dernier jaguar	 Gilles de Maistre	3.2 m.
14	Akademia pana Kleksa	 Maciej Kawulski	2.9 m.
15	Cocorico	 Julien Hervé	2.8 m.
16	Rafadan Tayfa 4: Hayrimatör	 İsmail Fidan	2.6 m.
17	Lee	 Ellen Kuras	2.5 m.
18	C'è ancora domani	 Paola Cortellesi	2.3 m.
19	Lohusa	 Kivanc Baruonu	2.3 m.
20	Wicked Little Letters	 Thea Sharrock	2.3 m.





















Local break-out hits that achieved more than 80% of admissions in their country of origin.

In Brazil, local titles had a relatively good year, reaching a market share of 10%.



With 18% of Brazil's total admissions in 2024, *Inside Out 2* became the highest-grossing film ever in Brazilian cinemas.

Top 20 films in Brazil, in 2024. Ranked by total admissions.

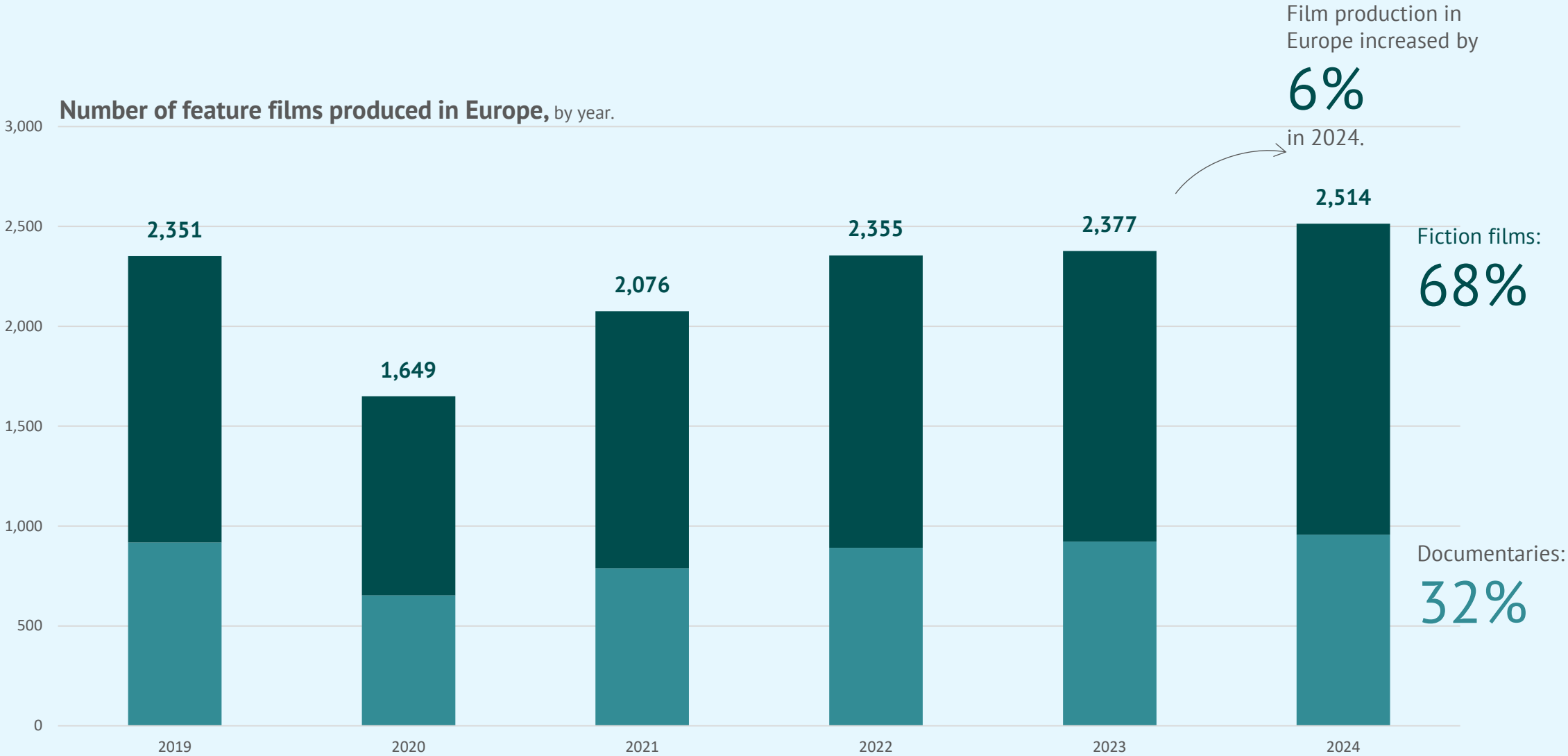
	Title	First country of origin, director	Total admissions
1	Inside Out 2	 Kelsey Mann	22.5 m.
2	Moana 2	 David G. Derrick Jr.	7.9 m.
3	Despicable Me 4	 Chris Renaud, Patrick Delage	7.9 m.
4	Deadpool & Wolverine	 Shawn Levy	7.4 m.
5	I'm Still Here	 Walter Salles	3.0 m.
6	The Forge	 Alex Kendrick	3.0 m.
7	It Ends with Us	 Justin Baldoni	3.0 m.
8	Kingdom of the Planet of the Apes	 Wes Ball	2.9 m.
9	Venom: the Last Dance	 Kelly Marcel	2.6 m.
10	Mufasa: The Lion King	 Barry Jenkins	2.4 m.
11	Kung Fu Panda 4	 Mike Mitchell, Stephanie Stine	2.2 m.
12	Godzilla x Kong: the New Empire	 Adam Wingard	2.2 m.
13	Anyone But You	 Will Gluck	2.2 m.
14	Aquaman and the Lost Kingdom	 James Wan	2.1 m.
15	Joker: Folie à Deux	 Todd Phillips	2.1 m.
16	Gladiator II	 Ridley Scott	2.1 m.
17	Wish	 Chris Buck, Fawn Veerasunthorn	2.0 m.
18	Bad Boys: Ride or Die	 Adil El Arbi, Bilall Fallah	2.0 m.
19	Os Farofeiros 2	 Roberto Santucci	1.9 m.
20	The Garfield Movie	 Mark Dindal	1.9 m.



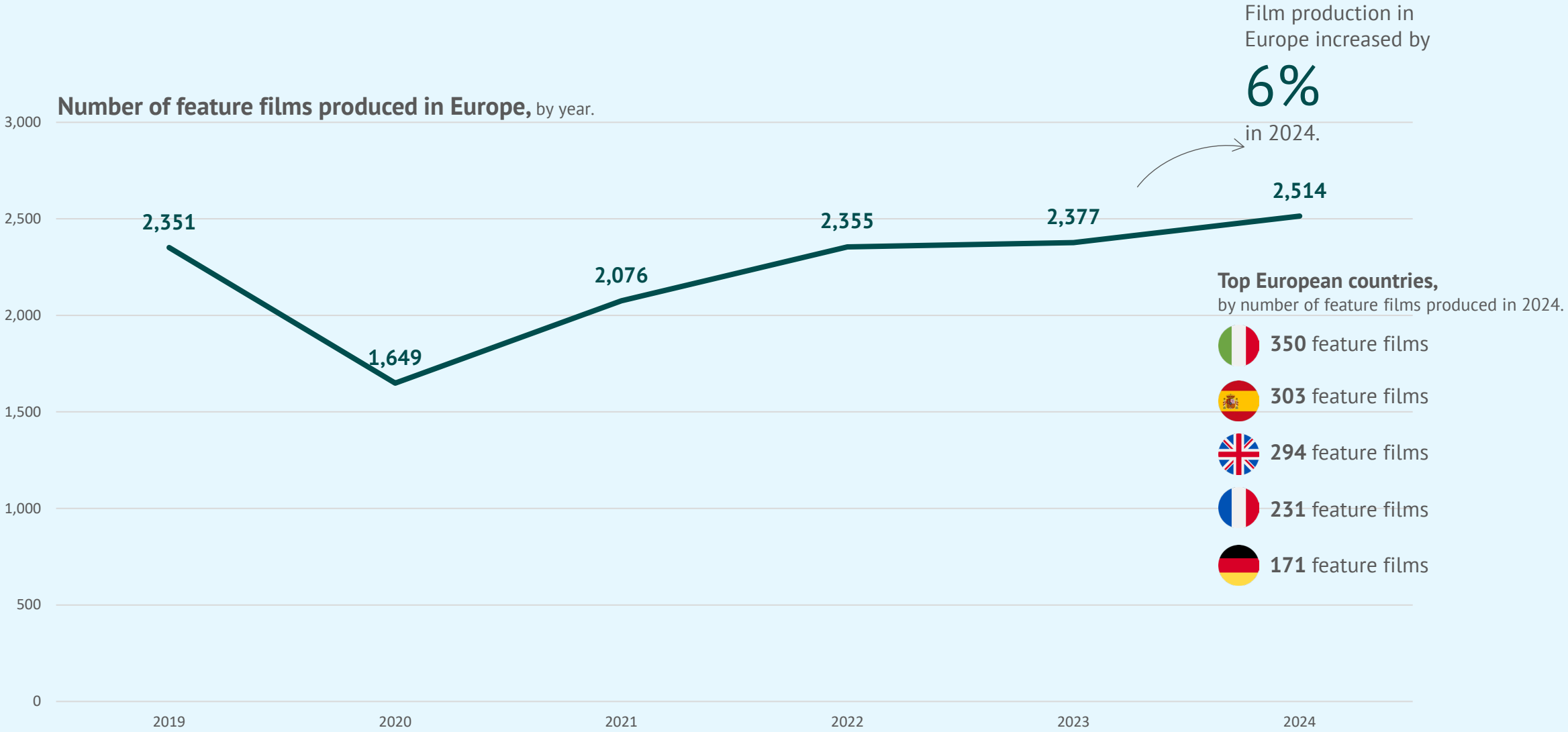


## 04 Film production

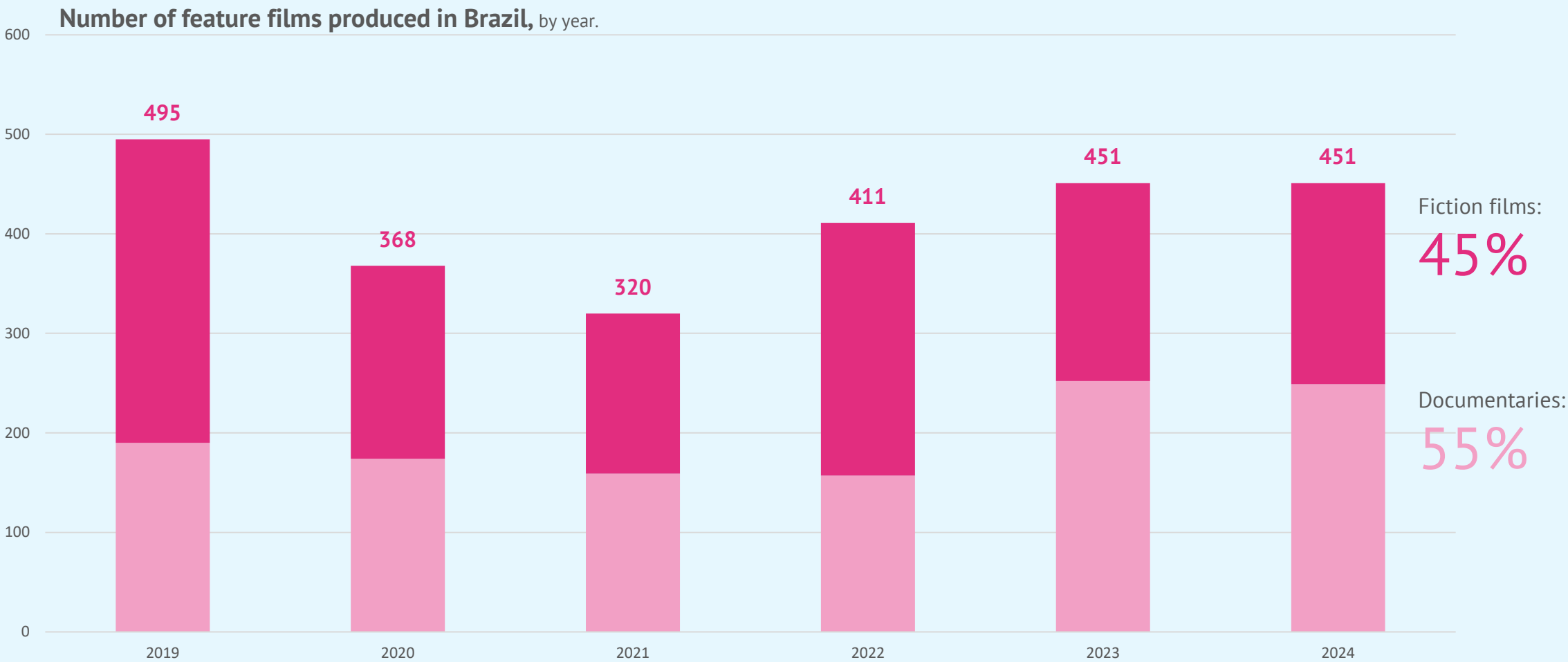
Film production in Europe reached an all-time high in 2024, with over 2 500 feature films produced.



# Film production in Europe reached an all-time high in 2024, with over 2 500 feature films produced.

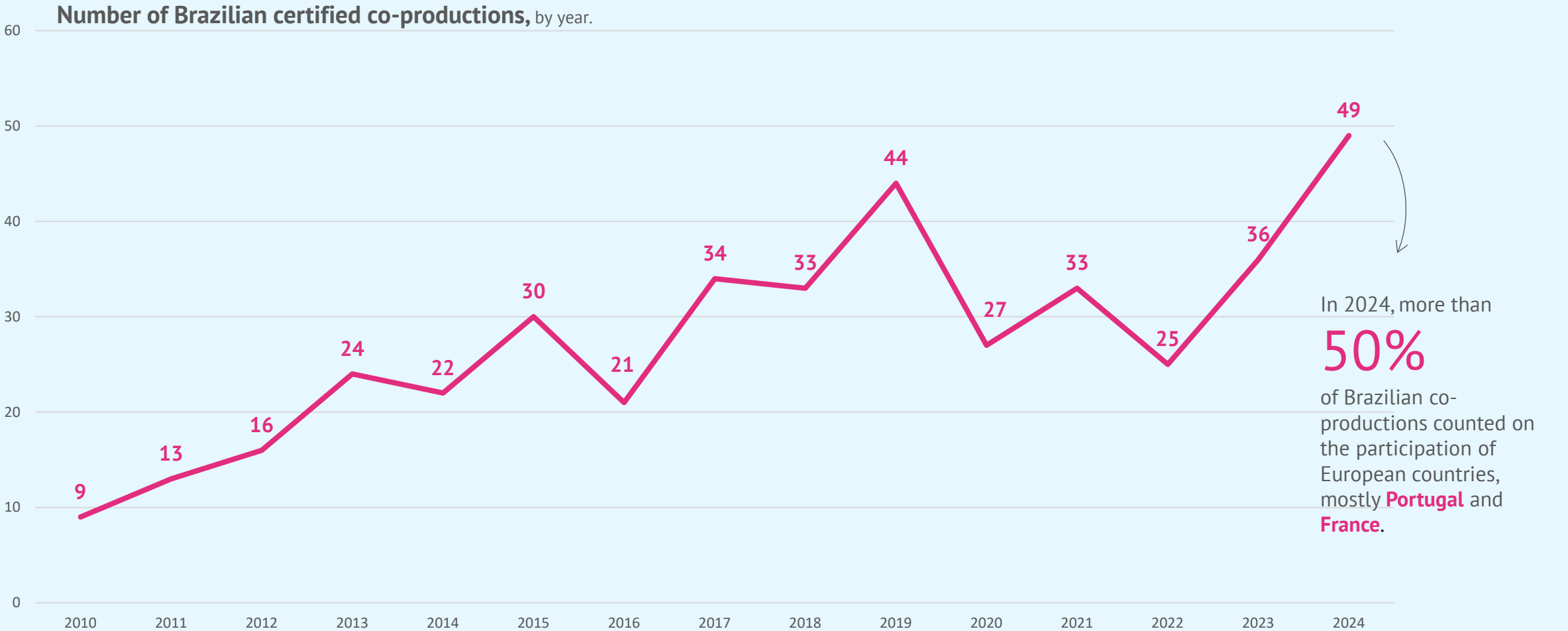


Brazil’s film production held steady above 450 titles in 2024, with documentaries making up a rising share of the overall output.





The number of Brazilian co-productions increased importantly in the past 15 years, reaching 49 certified projects in 2024.



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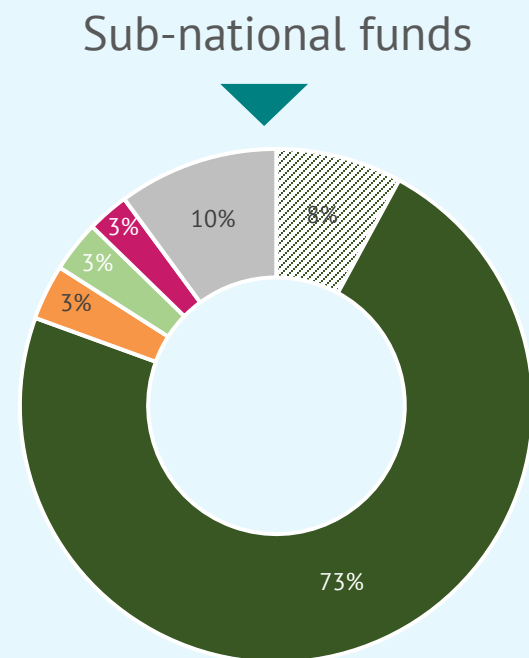
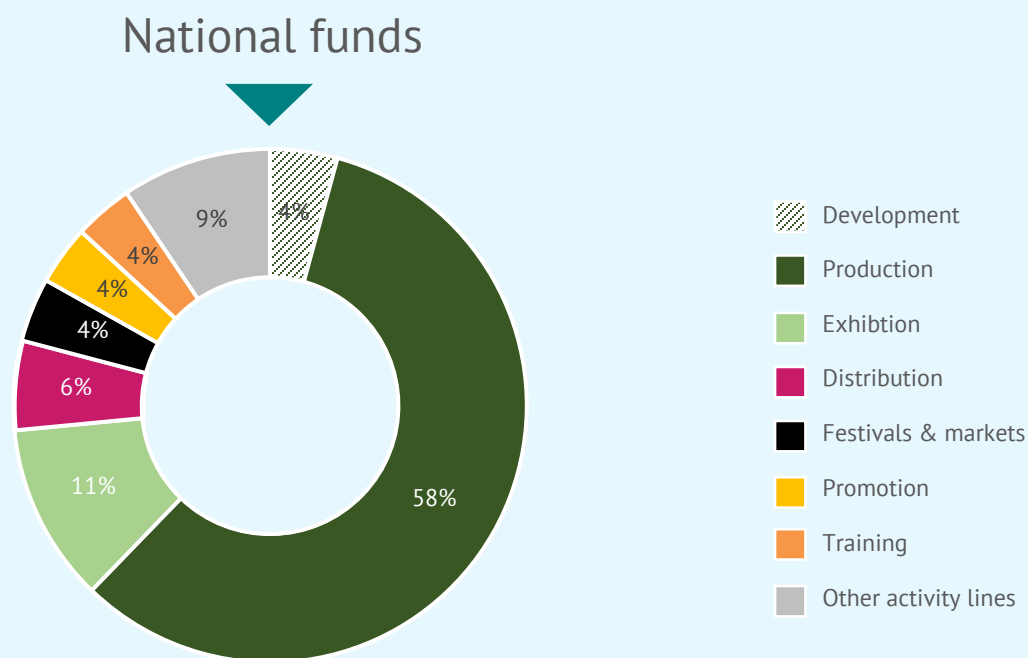
In 2024, more than  
**50%**  
of Brazilian co-productions counted on the participation of European countries, mostly **Portugal** and **France**.



# 05 Film policy

# The majority of public support in Europe is allocated to production and development.

Breakdown of net activity spend – national funds <sup>est</sup>  $\Sigma$ 2018-2022

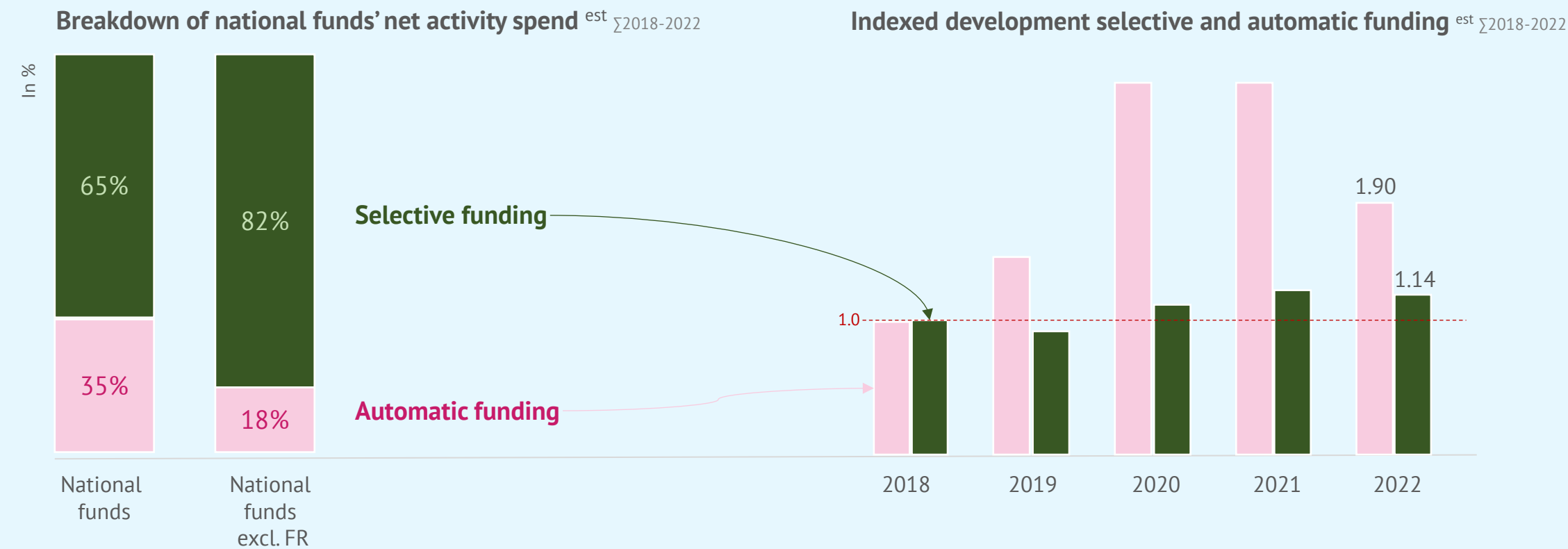


# The majority of public support in Europe is allocated to production and development.

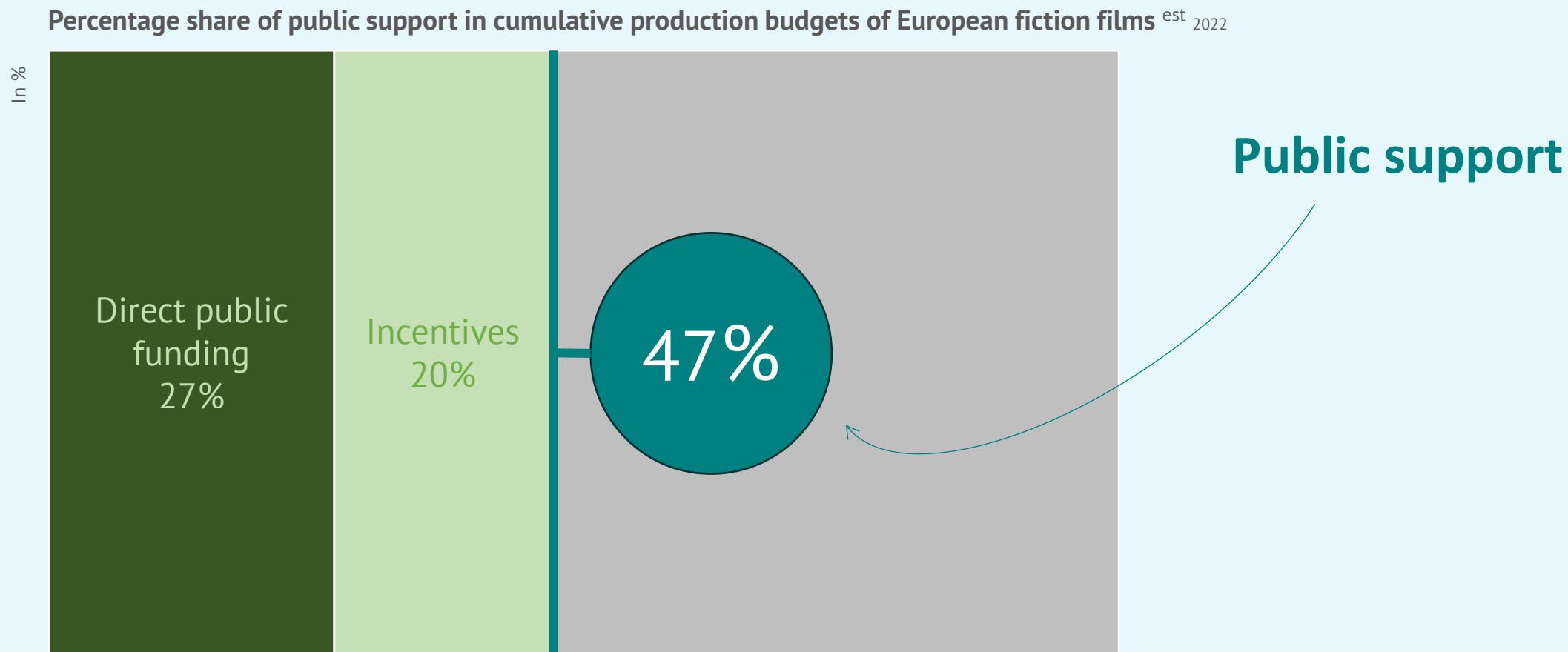
Breakdown of net activity spend – national funds <sup>est</sup> ∑2018-2022



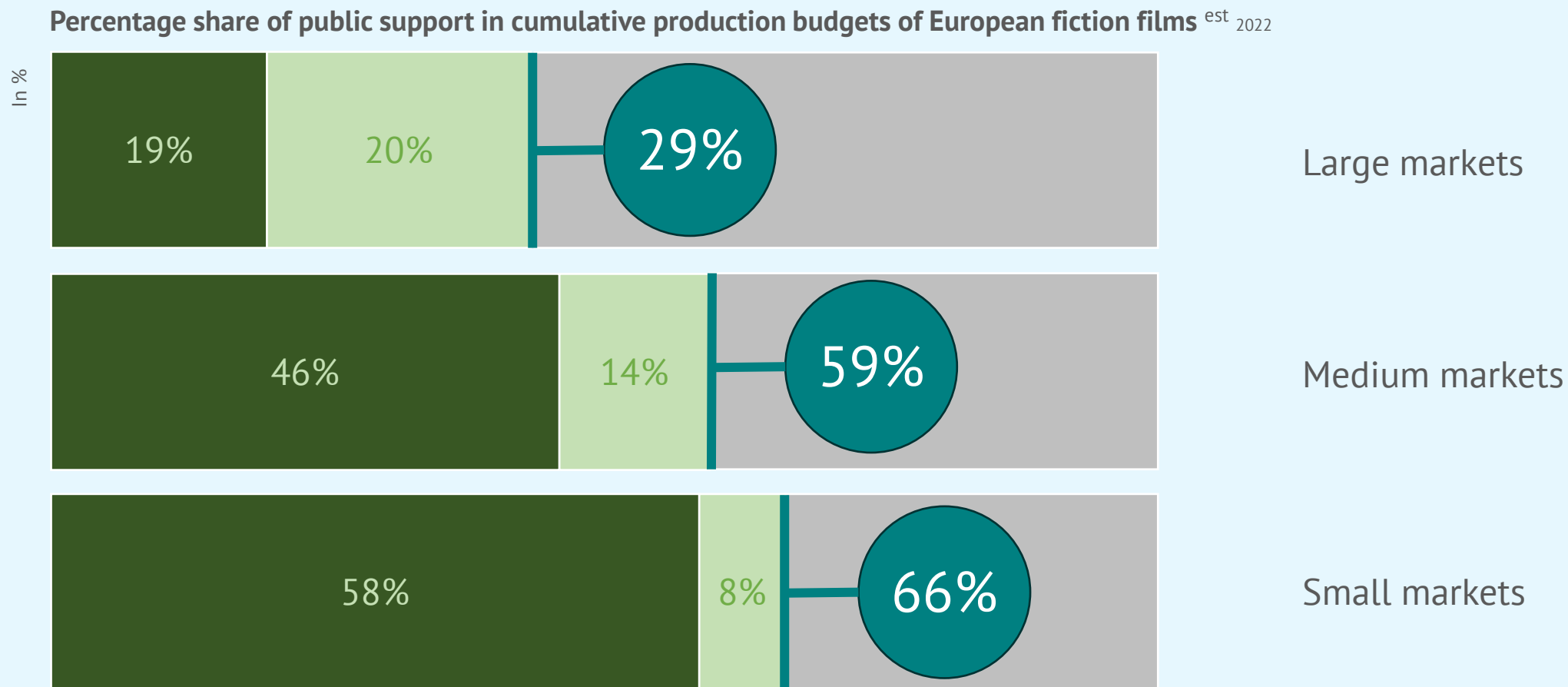
The majority of direct public funding is selective, but there is a trend towards automatic funding.



Nearly 50% of the production costs of European fiction films are financed through public support.

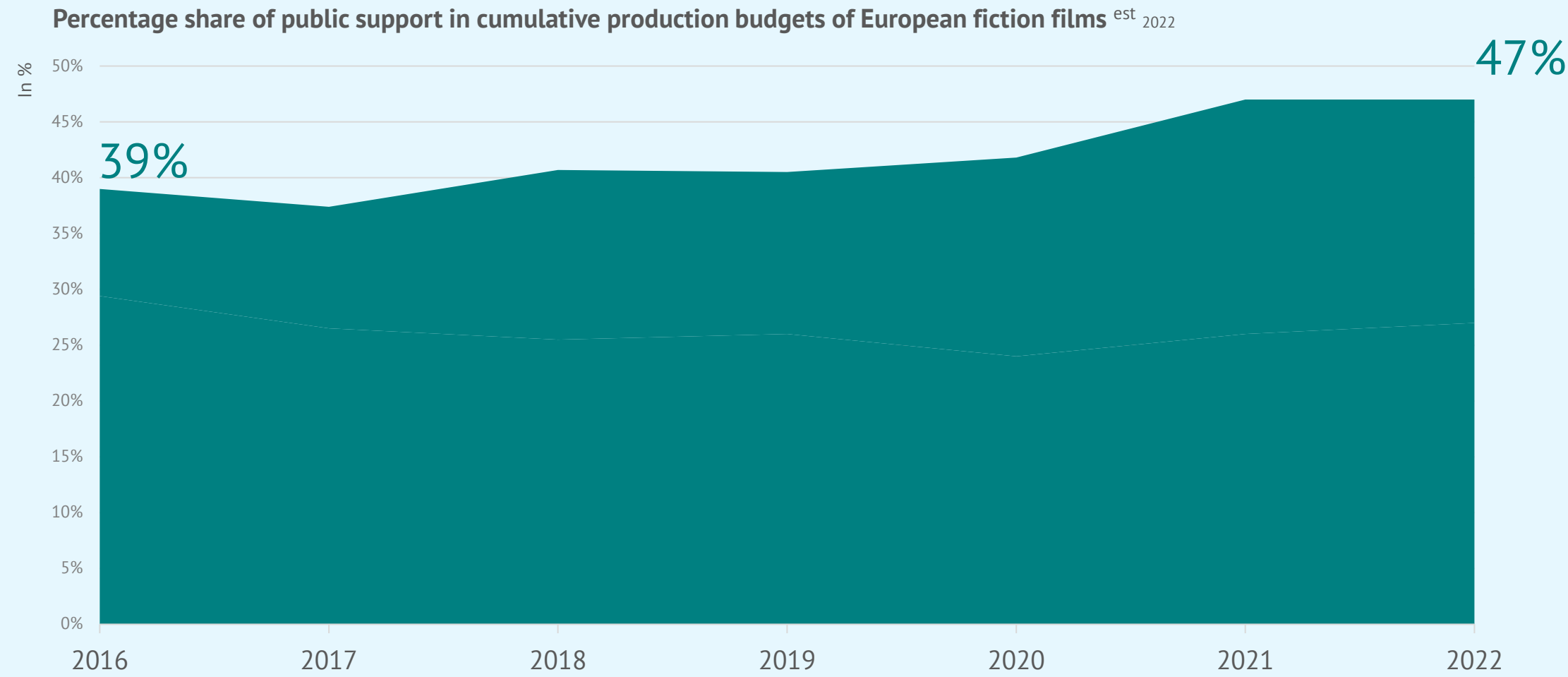


There are significant differences depending on market size, with direct public funding playing a much more important role in small and medium-sized markets.

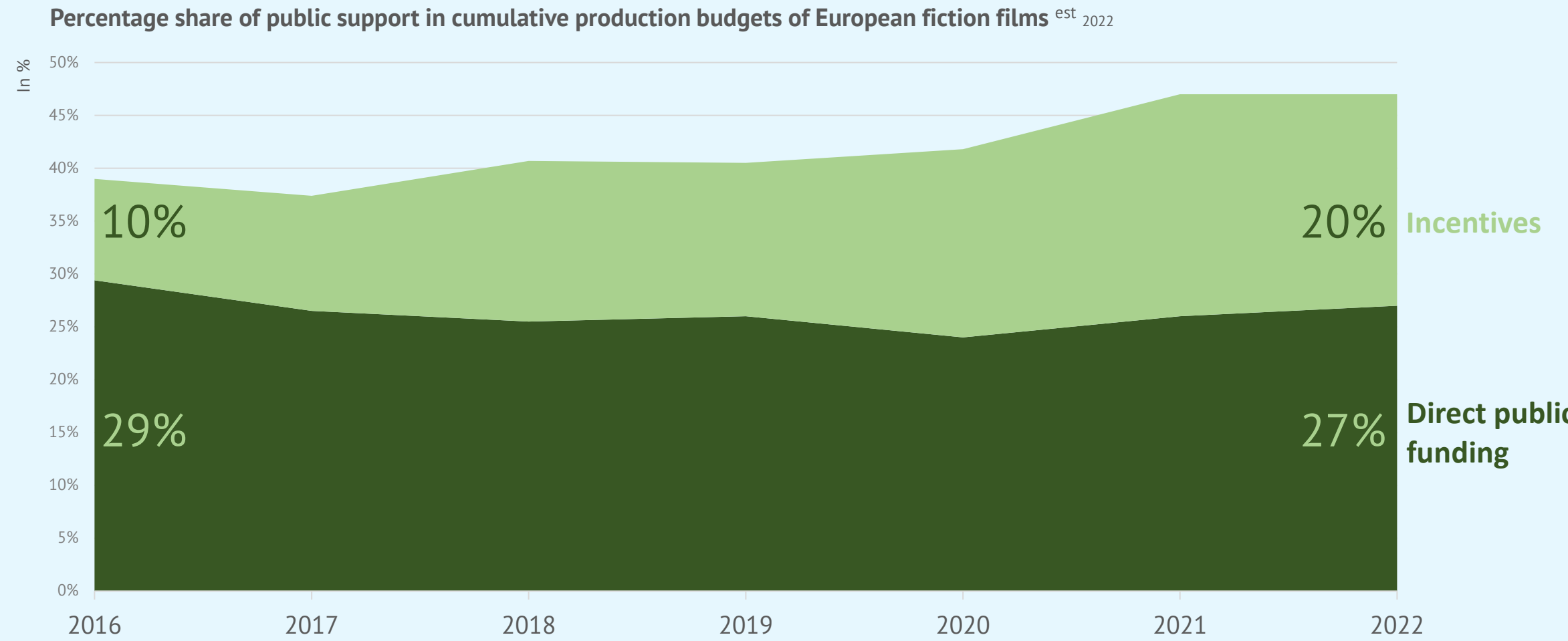




# Public support has become more important...



# ...driven by increasing share incentives



# FOCUS 2025

WORLD FILM MARKET TRENDS

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