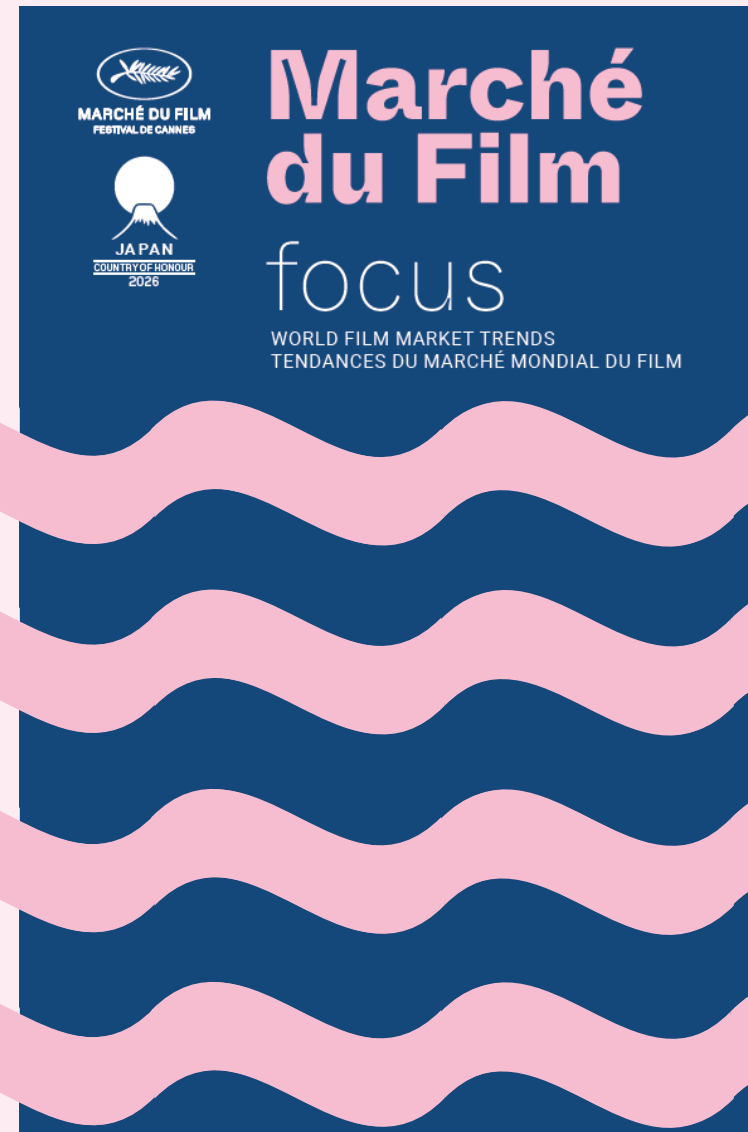


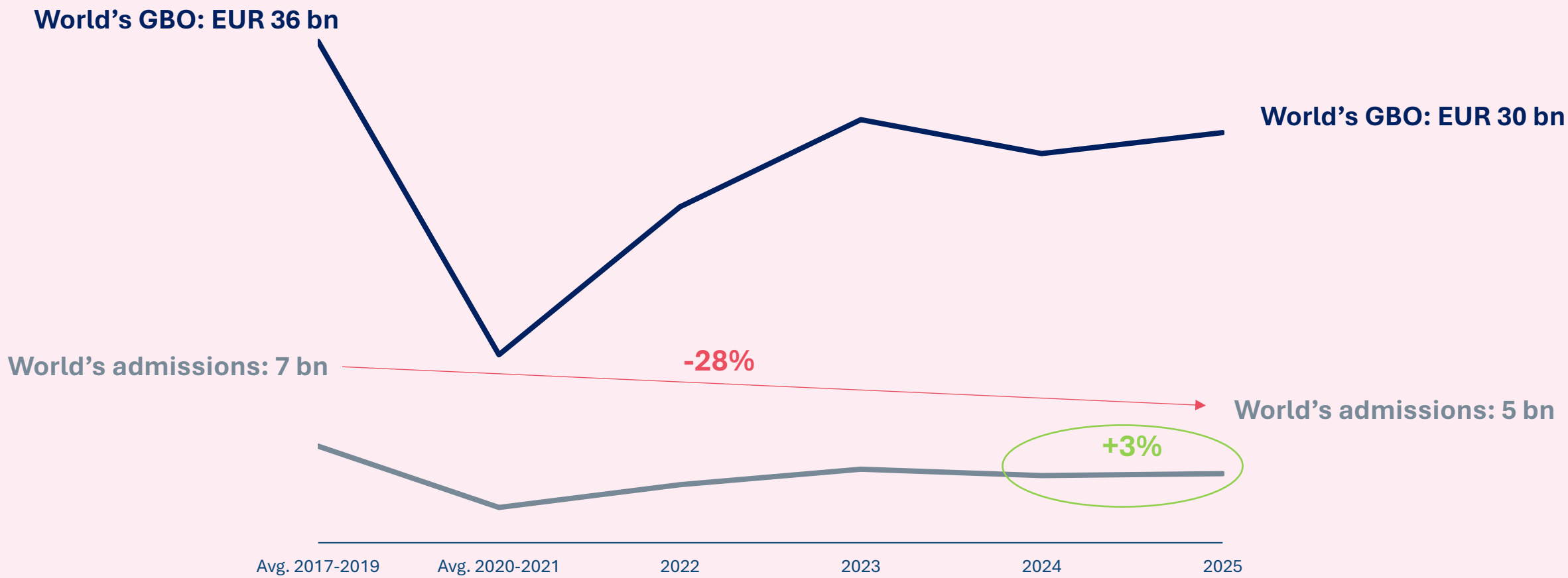
FOCUS 2026

WORLD FILM MARKET TRENDS

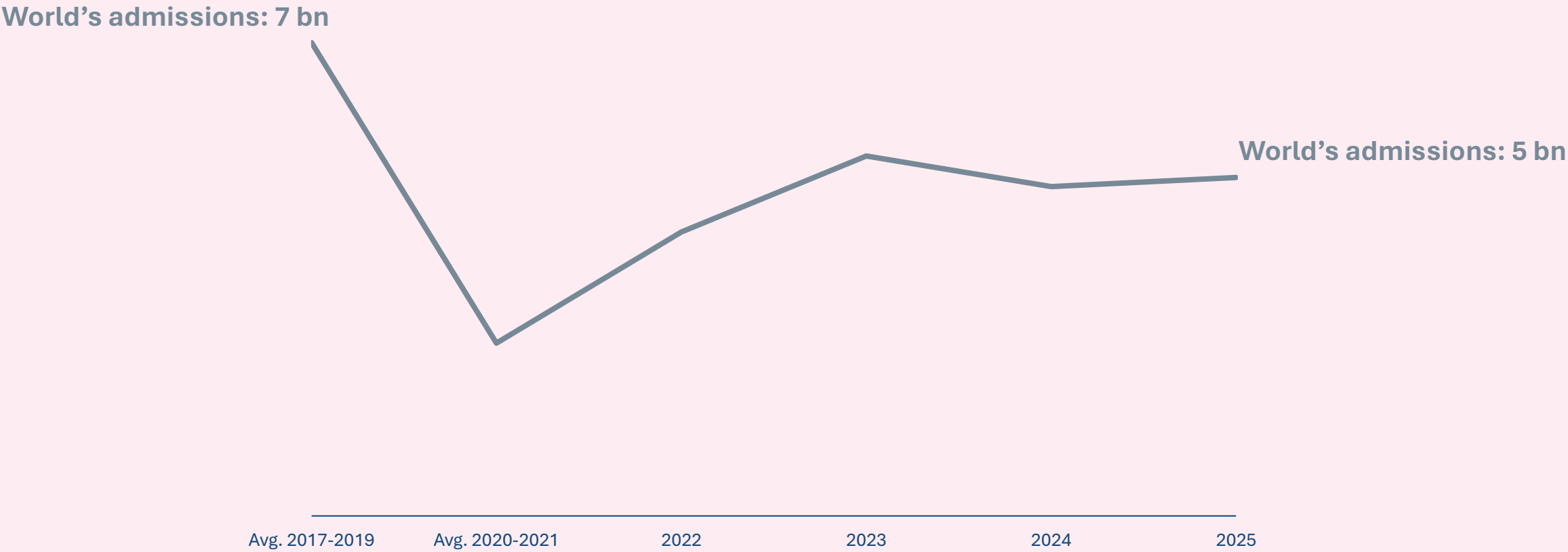


01 How did Box Office develop in 2025?

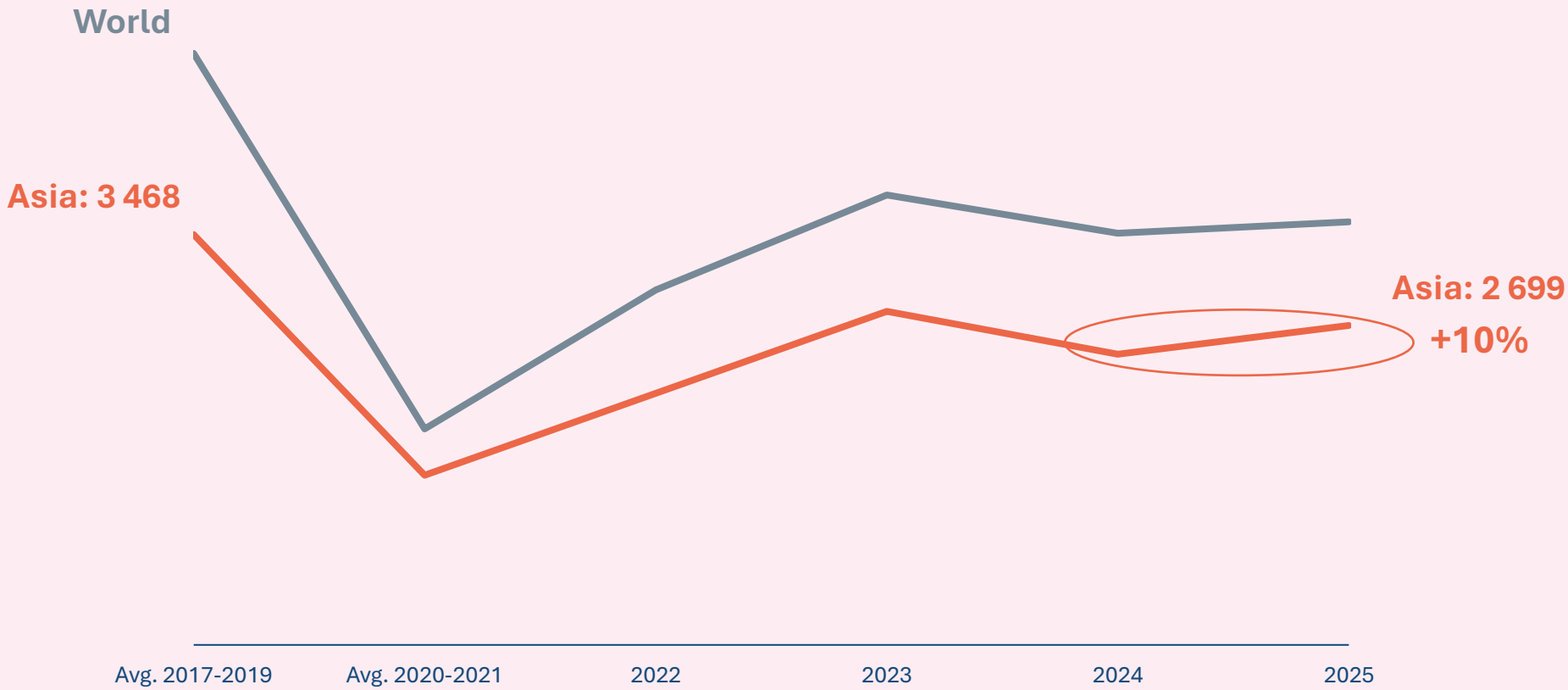
Admissions dropped to 5 bn, compared to 7 bn pre-pandemic



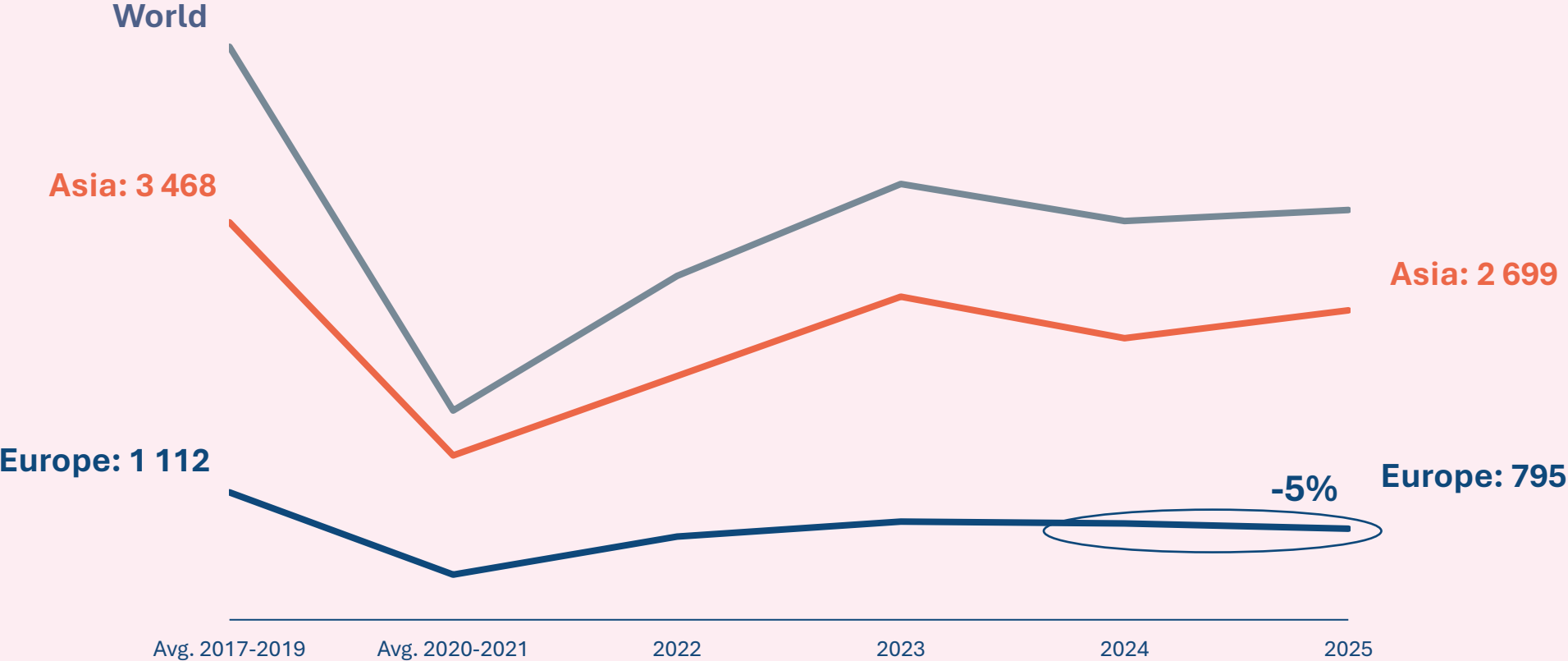
Admissions dropped to 5 bn, compared to 7 bn pre-pandemic



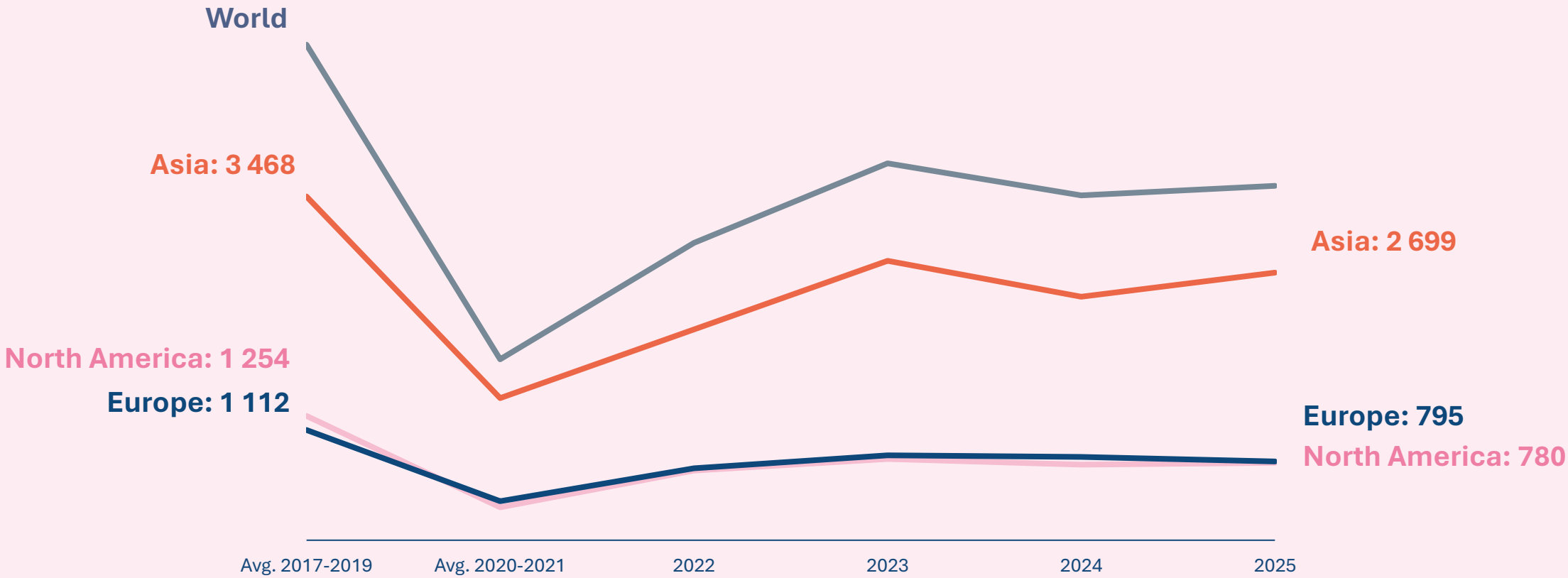
World's admissions growth was driven by Asia



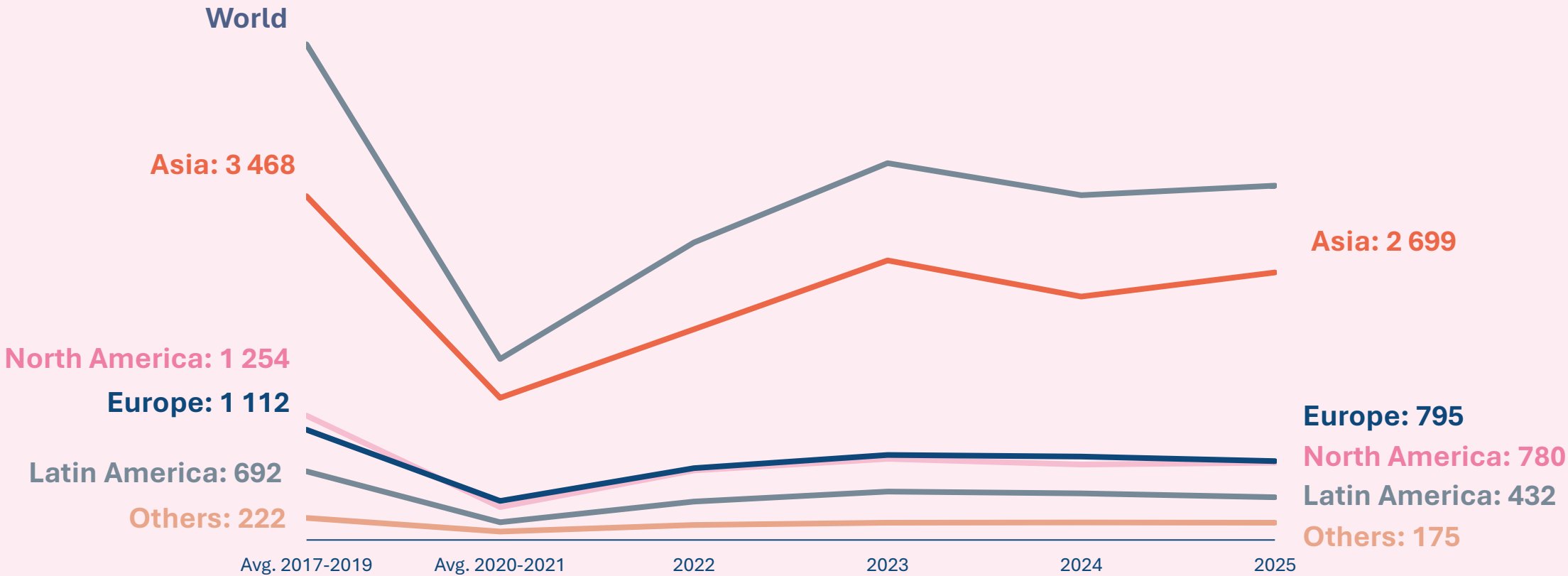
World's admissions growth was driven by Asia



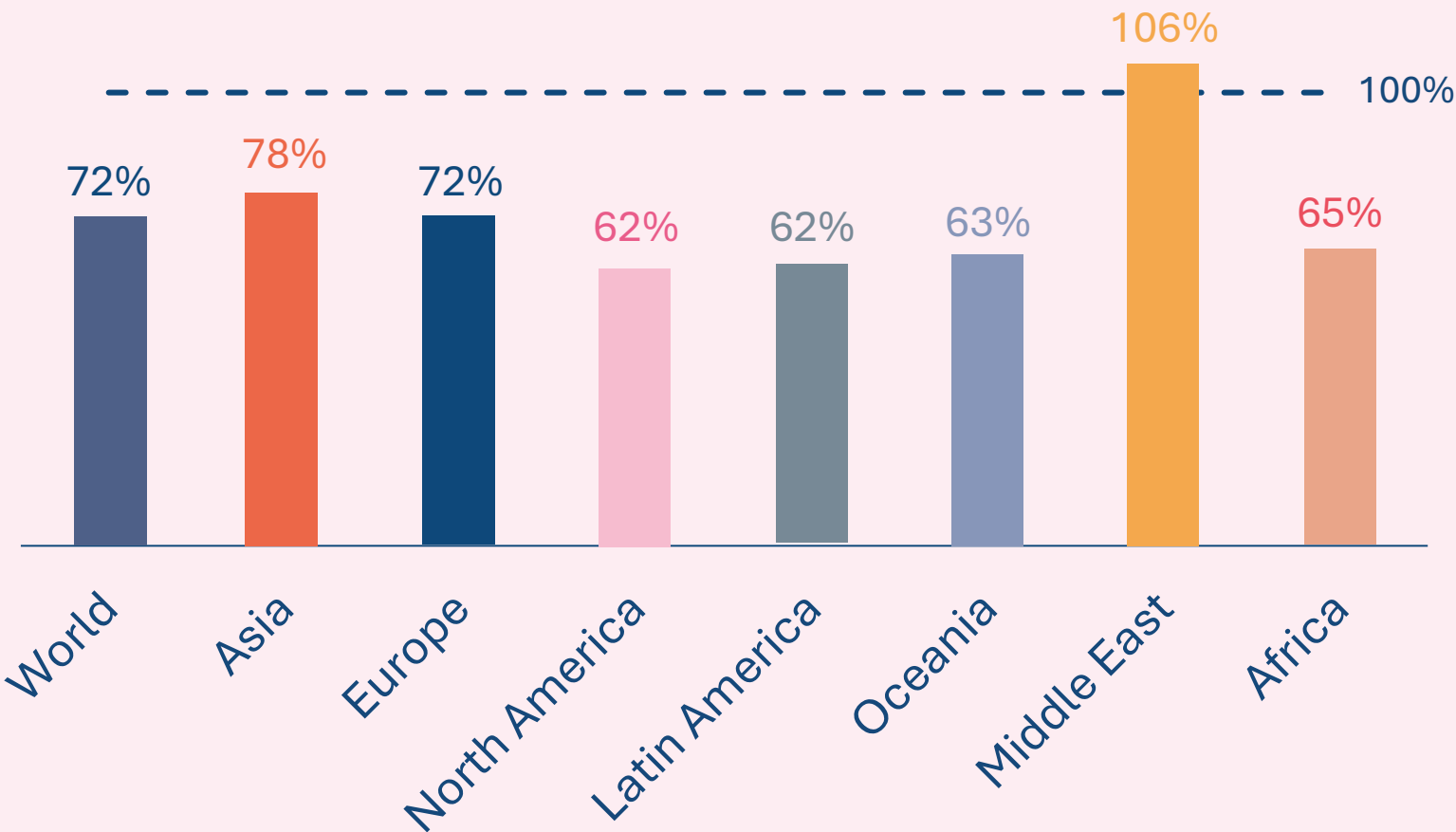
World's admissions growth was driven by Asia



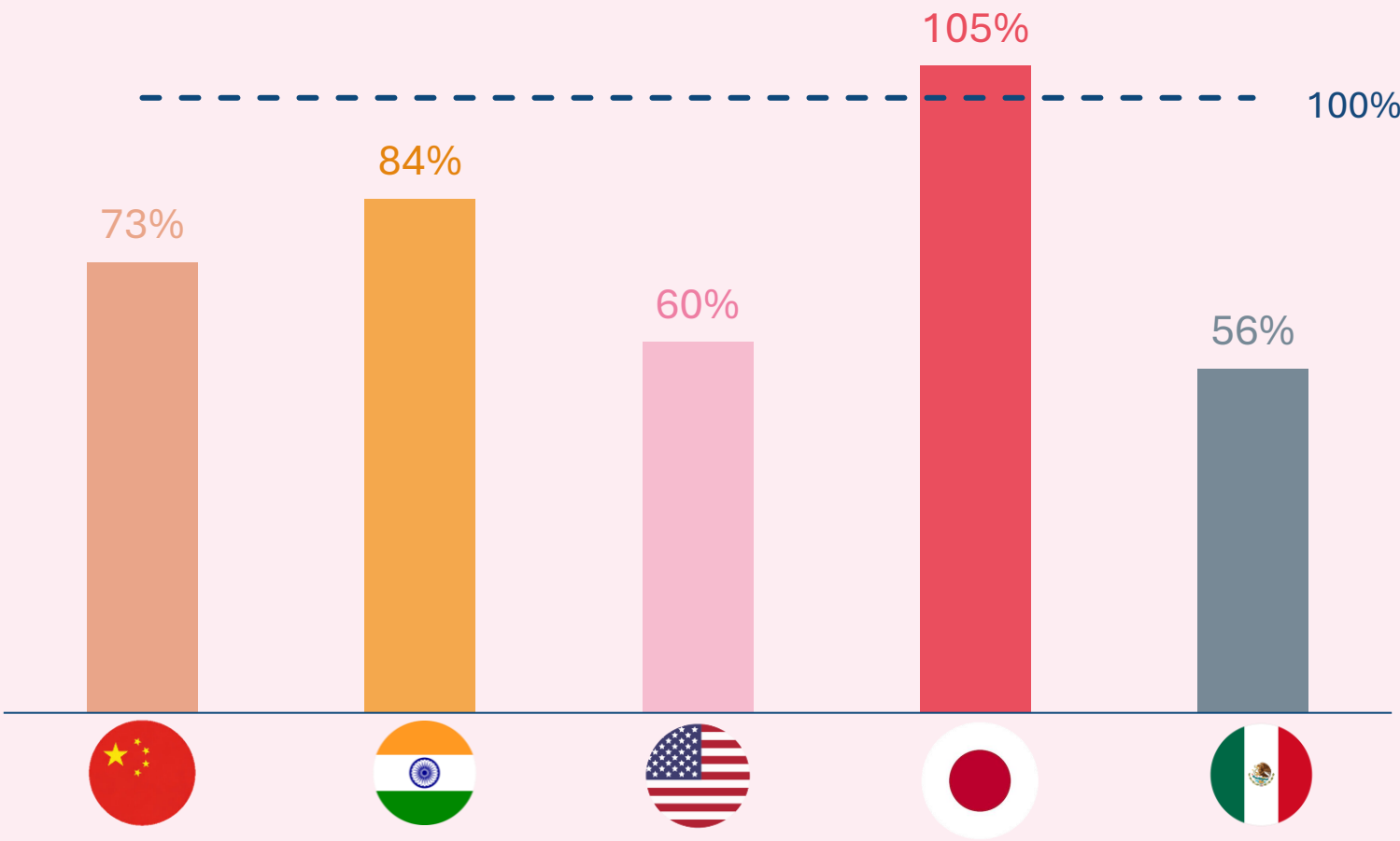
World's admissions growth was driven by Asia

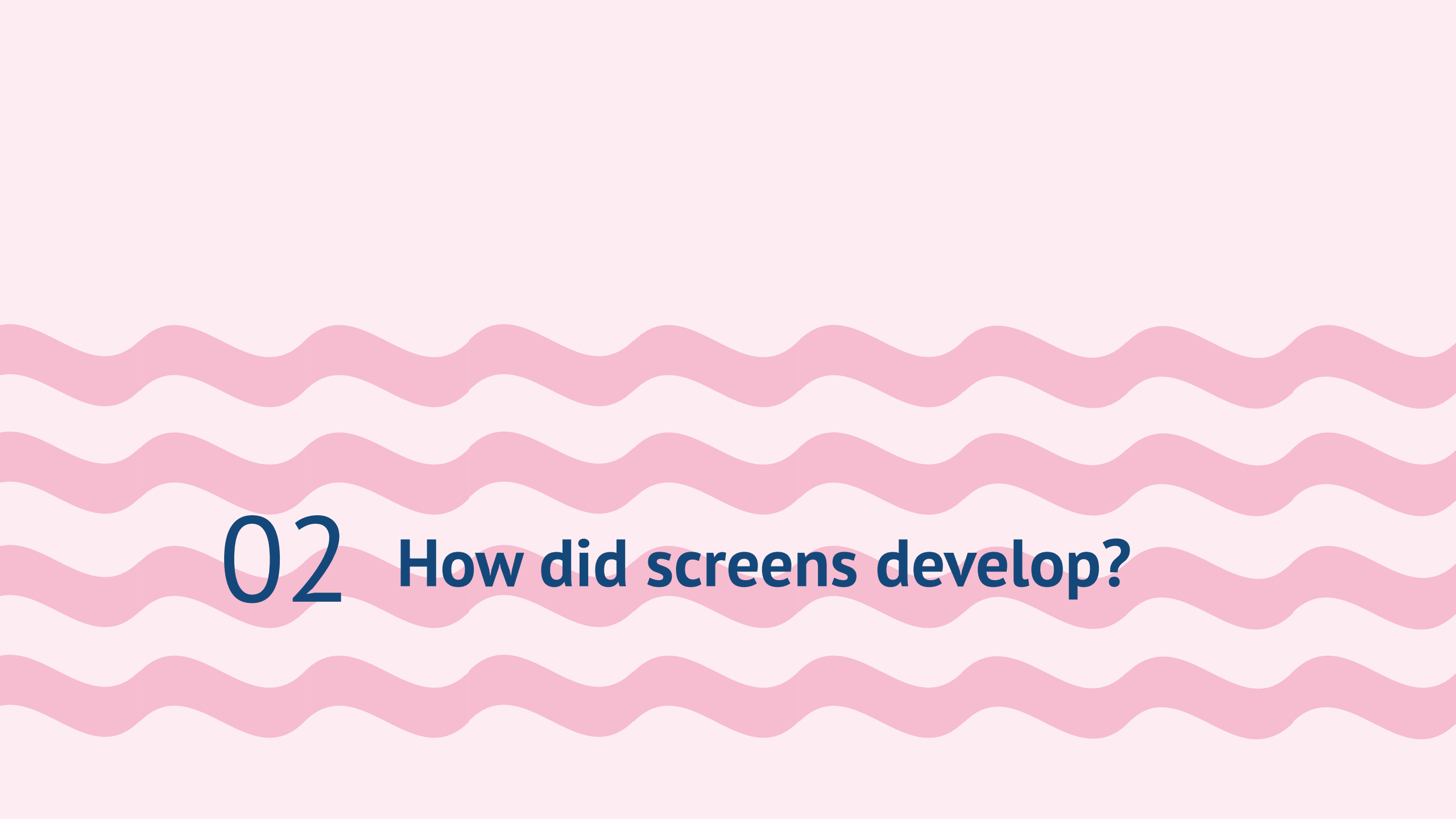


Recovery rates generally range between 60 and 70%



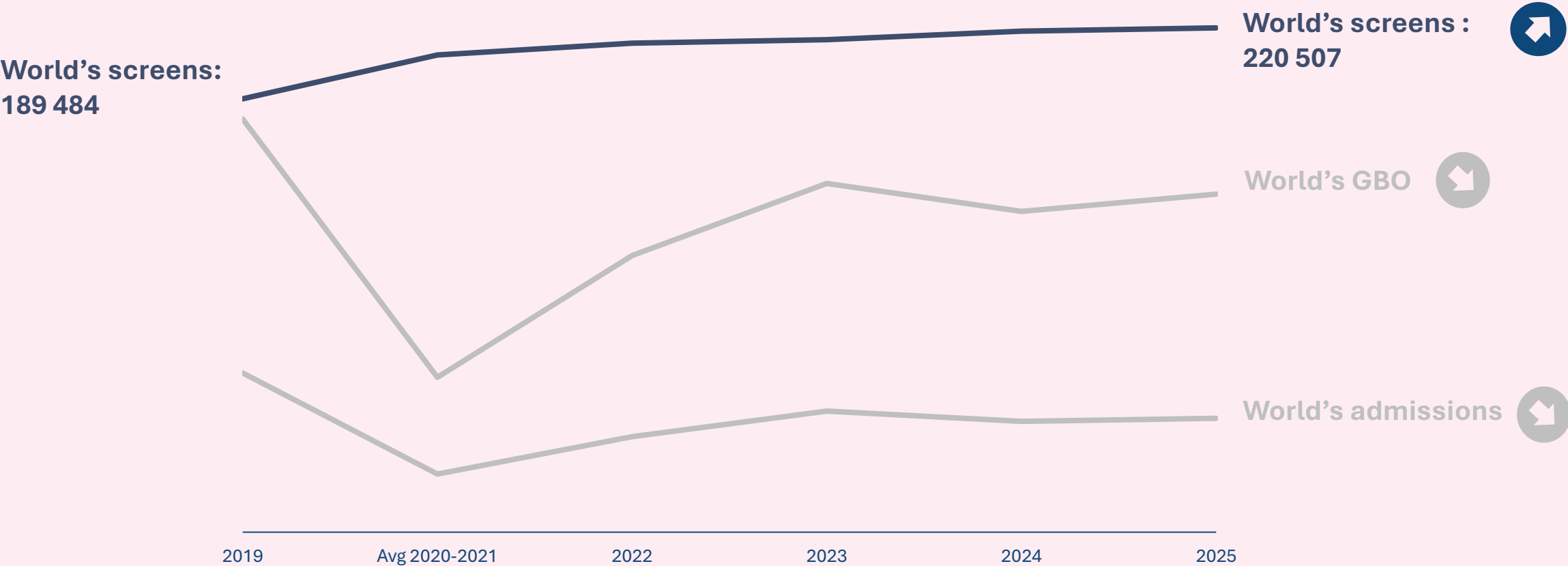
The Japanese market outperformed pre-covid results



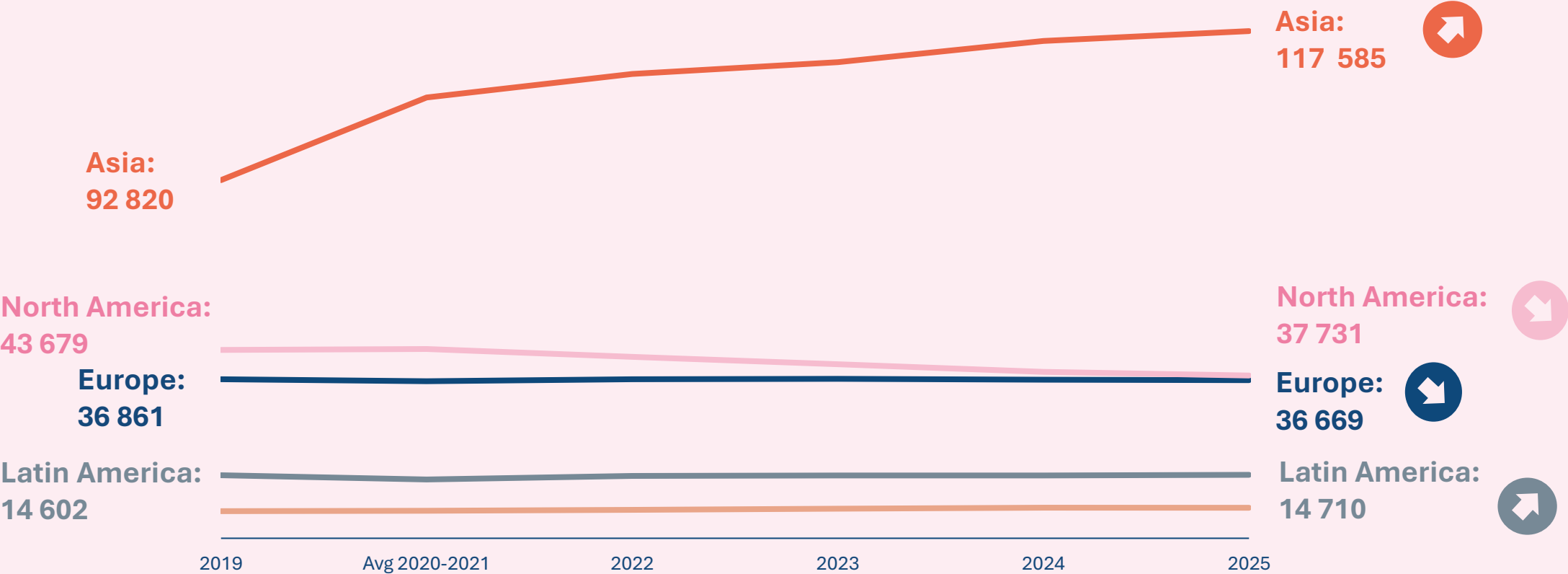
The background of the slide features a repeating pattern of horizontal, wavy lines in a light pink color against a white background. The waves are smooth and rhythmic, creating a decorative border effect.

02 How did screens develop?

The number of screens worldwide increased steadily since 2019...

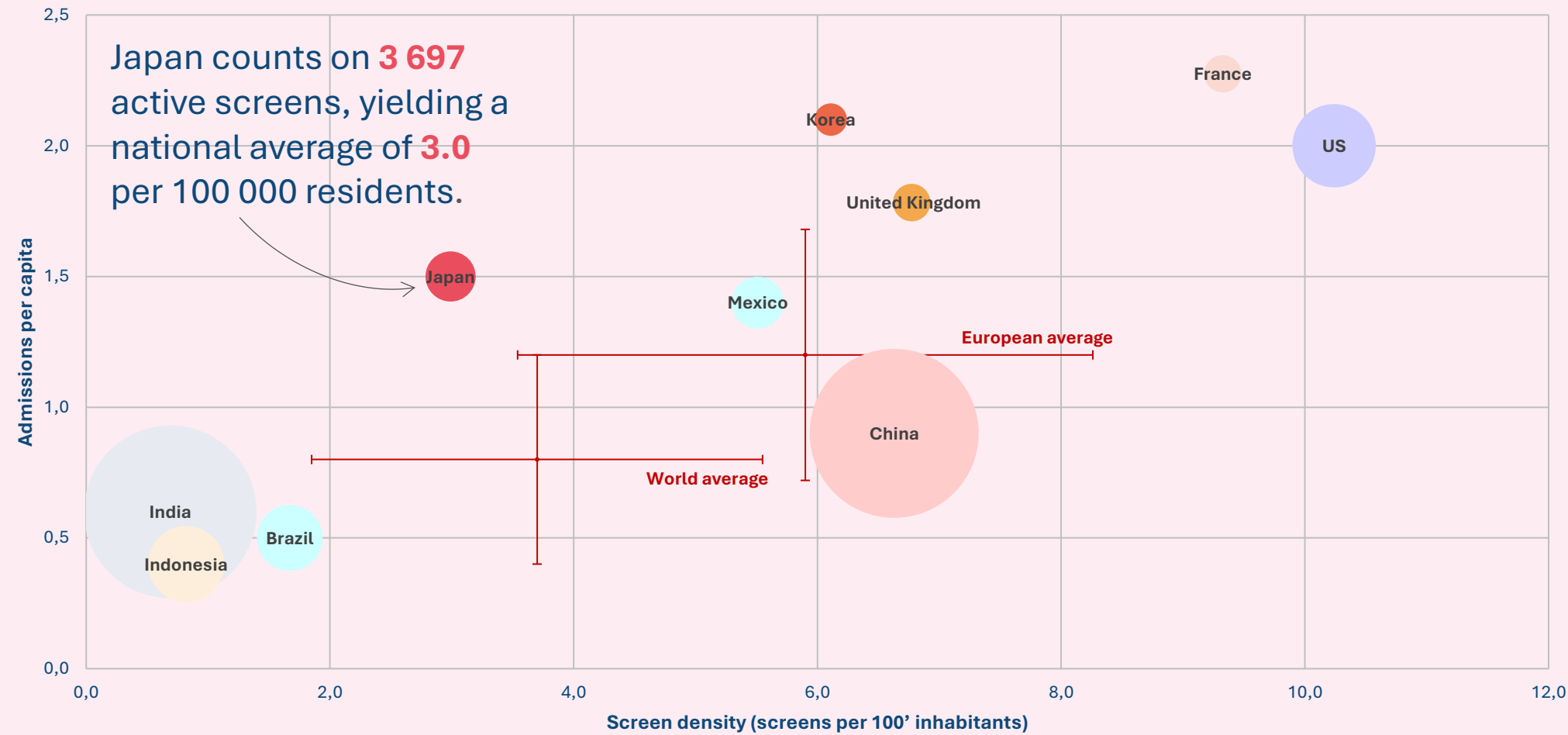


... driven mainly by Asia



Japan has a comparatively low screen density among the top ten countries with the highest number of screens

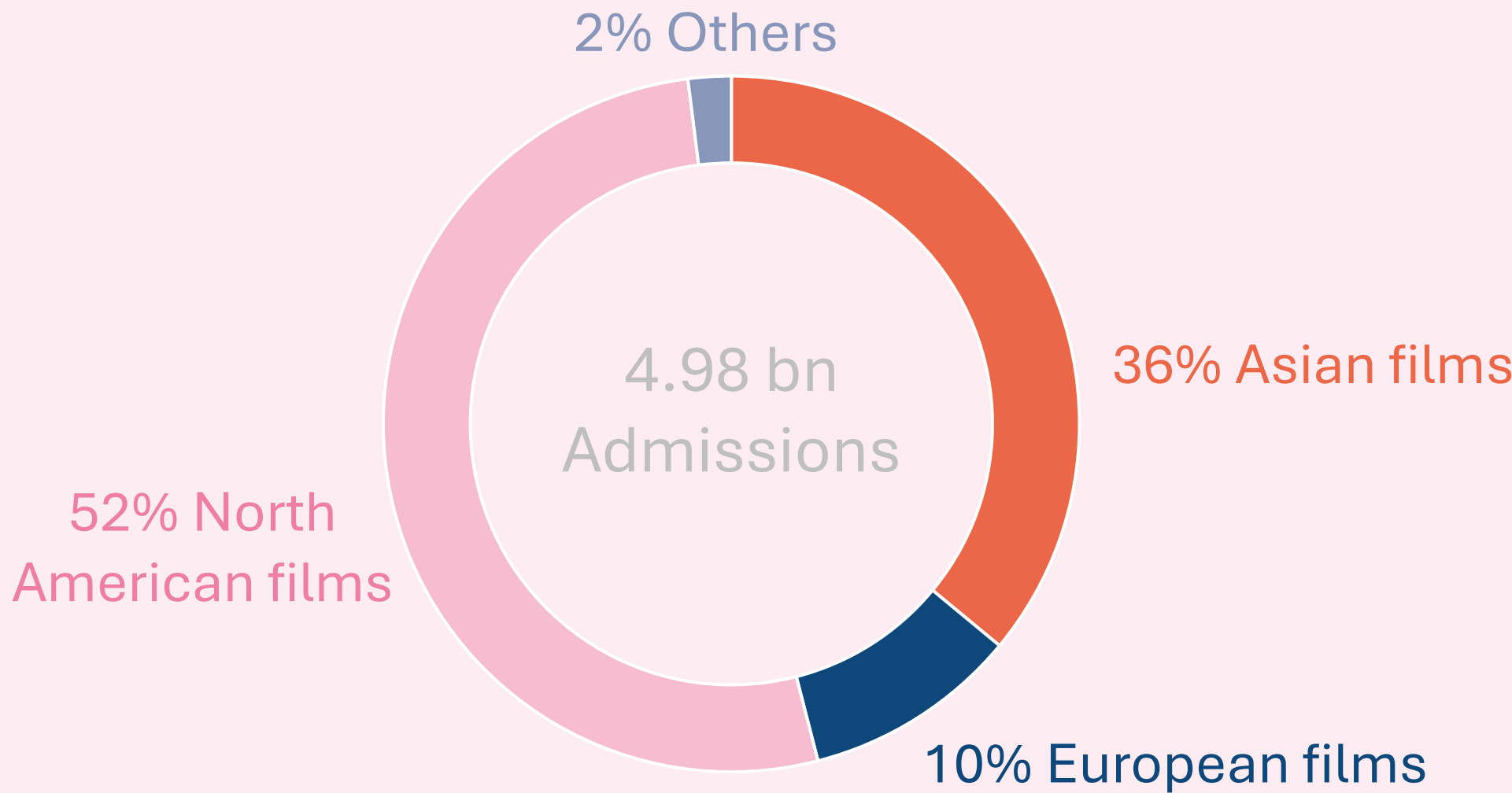
Screen density and admissions per capita, by country. 2025 figures. Bubble size represents the relative size of each market.



The background of the slide features a repeating pattern of horizontal, wavy lines in a light pink color, creating a textured, water-like effect.

03 What were the most successful films?

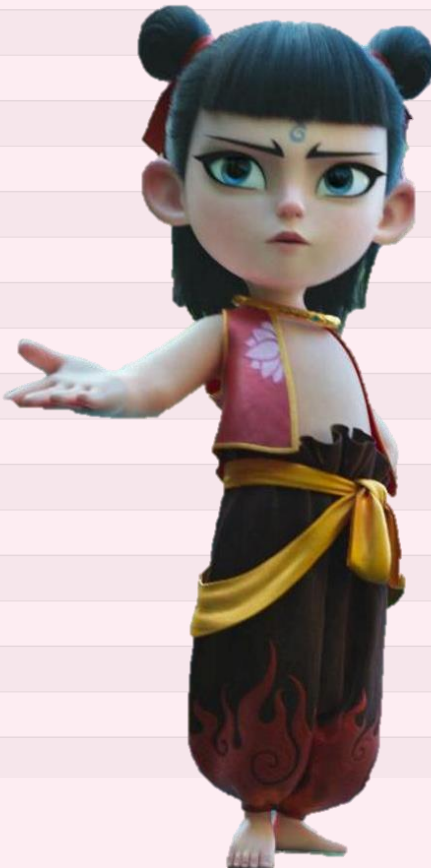
US and Asian films accounted for almost 90% of global admissions...



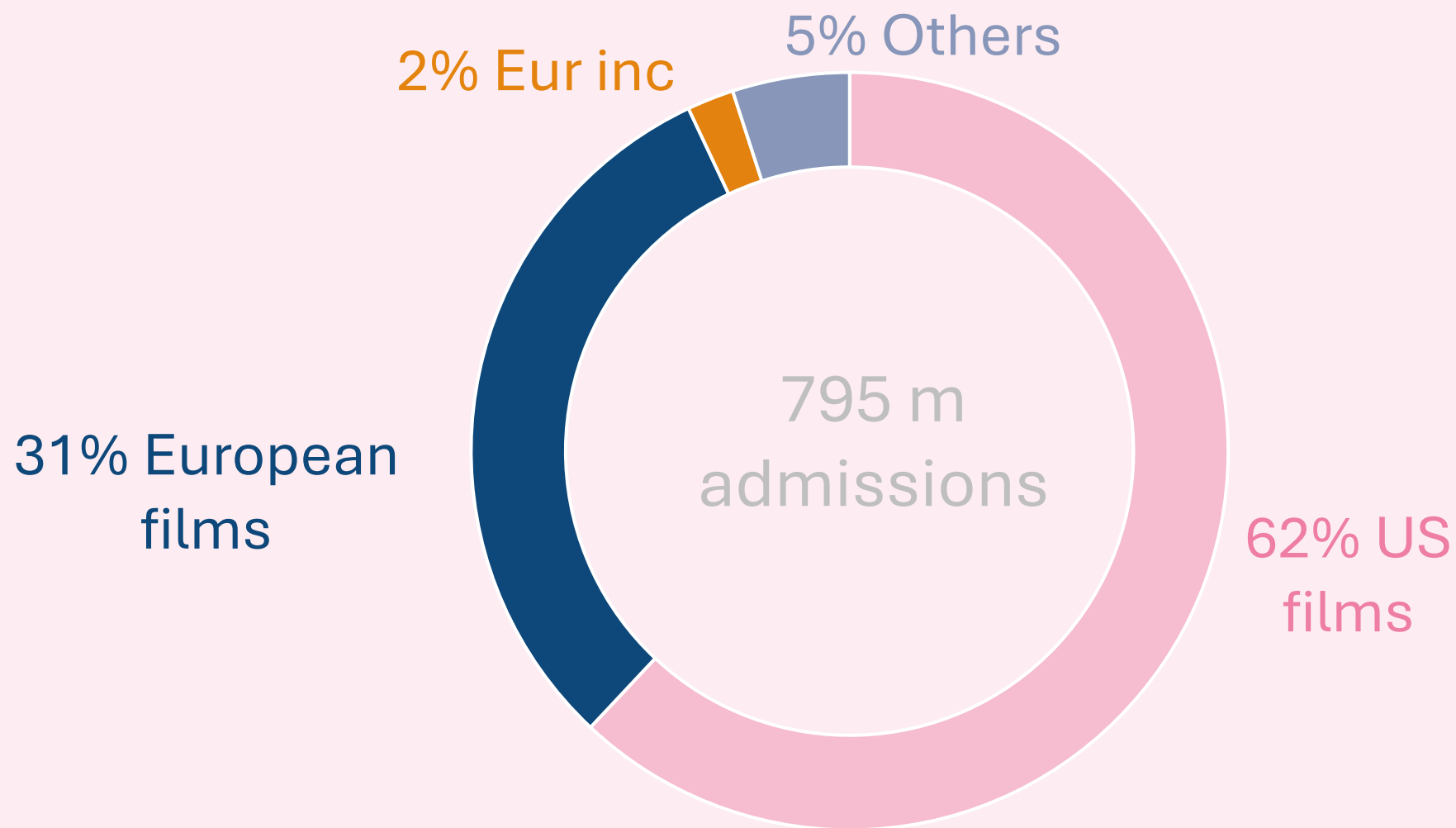
... with *Ne Zha 2* becoming the first non-US studio film to top the world charts

Top 20 films worldwide, in 2025. Ranked by total GBO.

	Original title	First Country of origin, Director(s)	Global Box Office	prov
1	Ne Zha 2	 Y. Yang	1.77bn	
2	Zootopia 2	 J. Bush, B. Howard	1.3bn	
3	Lilo & Stitch	 D. Fleischer-Camp	918.6m	
4	Minecraft	 J. Hess	847.9m	
5	Jurassic Word: Rebirth	 G. Edwards	769.2m	
6	Avatar: Fire and Ash	 J. Cameron	760.9m	
7	Demon Slayer: Infinity Castle - Part 1	 H. Sotozaki, M. Ouse	690.1m	
8	How to Train Your Dragon	 D. DeBlois	563.1m	
9	F1	 J. Kosinski	558.1m	
10	Superman	 J. Gunn	545.8m	
11	Mission: Impossible - The Final Reckoning	 C. McQuarrie	523.3m	
12	The Fantastic Four: First Steps	 M. Shakman	460.6m	
13	Wicked: For Good	 J. Chu	448.8m	
14	The Conjuring: Last Rites	 M. Chaves	437.8m	
15	Detective Chinatown 1900	 C. Sicheng, M. Dai	402.6m	
16	Captain America: Brave New World	 J. Onah	366.1m	
17	Dead to Rights	 S. Ao	341m	
18	Thunderbolts	 J. Schreier	338.4m	
19	Sinners	 R. Coogler	325.6m	
20	Final Destination Bloodlines	 Z. Lipovsky, A. Stein	279.5m	

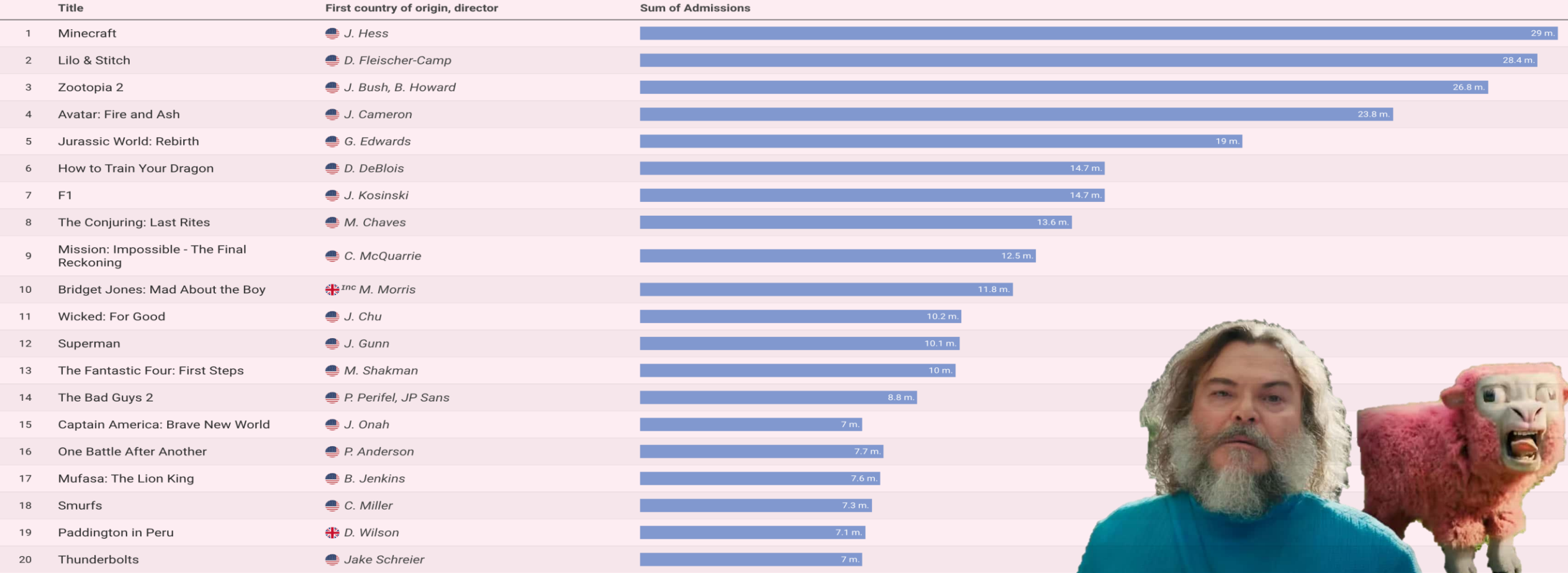


Most tickets in Europe were sold to see US films...



... with 16 out of the biggest 20 films in Europe in 2025 being US franchise films...

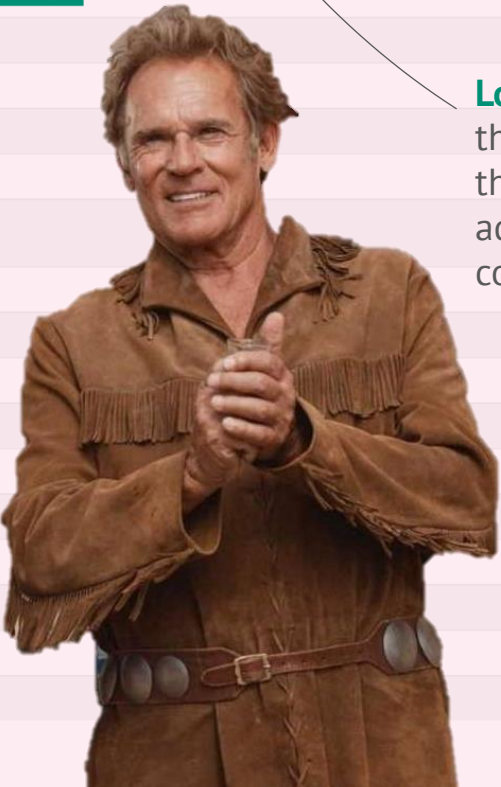
Top 20 films in Europe, in 2025. Ranked by total admissions.



... and the biggest European films making most of their admissions in their own domestic market

Top 20 European films in Europe, in 2025. Ranked by total admissions.

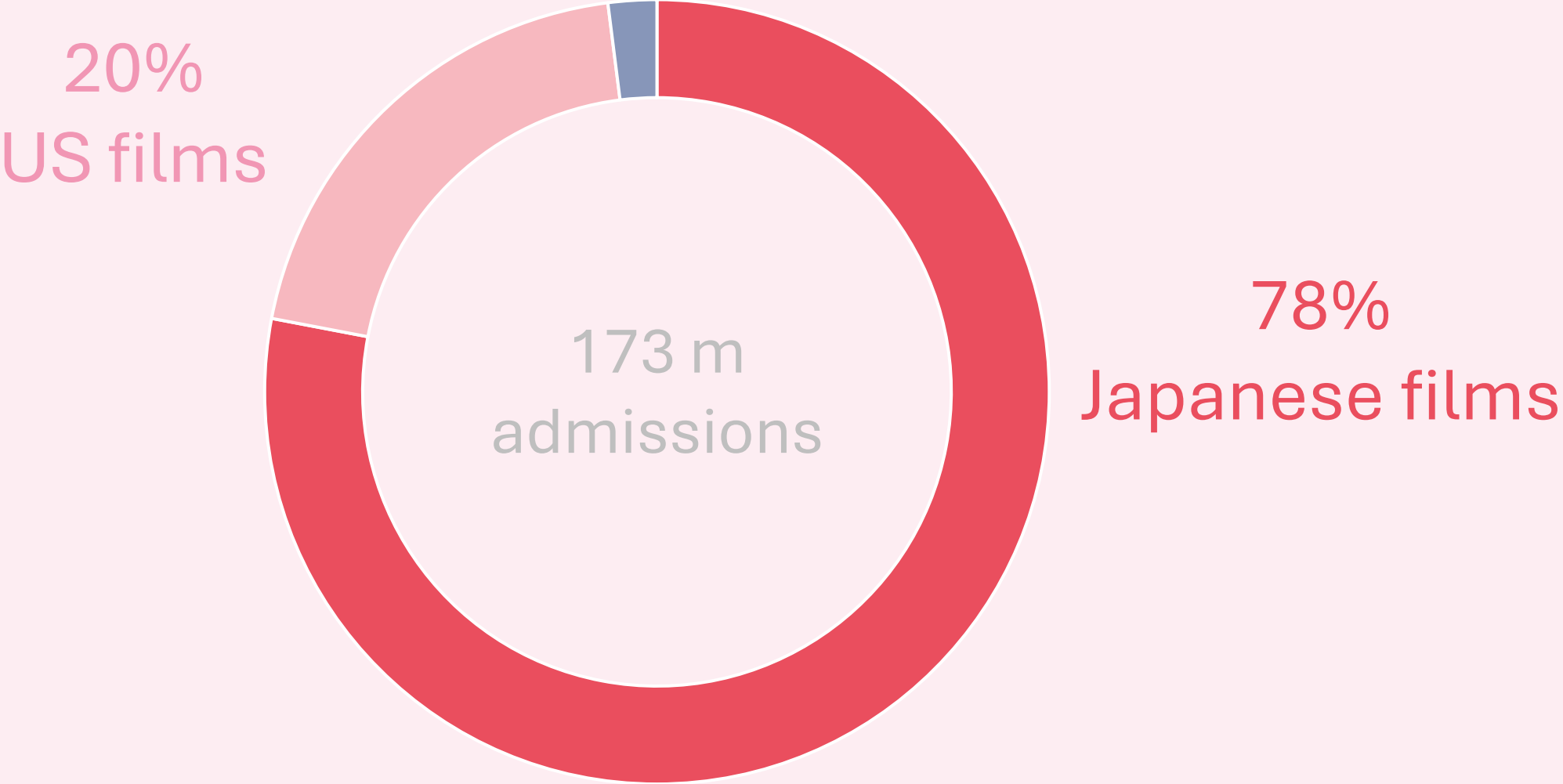
	Title	First country of origin, director	Sum of Admissions
1	Bridget Jones: Mad About the Boy	 <i>znc M. Morris</i>	12 m.
2	Paddington in Peru	 <i>D. Wilson</i>	7 m.
3	Das Kanu des Manitu	 <i>M. Herbig</i>	6 m.
4	Downton Abbey: The Grand Finale	 <i>znc S. Curtis</i>	5 m.
5	Buen Camino	 <i>G. Nunziante</i>	5 m.
6	Die Schule der magischen Tiere 4	 <i>B. Jasper, M. Peren</i>	3 m.
7	God Save the Tuche	 <i>J. Rouve</i>	3 m.
8	We Live in Time	 <i>J. Crowley</i>	3 m.
9	Conclave	 <i>E. Berger</i>	3 m.
10	Soyut Disavurumcu Bir Dostlugun Anatomisi Veyahut Yan Yana	 <i>M. Baykal</i>	3 m.
11	Follemente	 <i>P. Genovese</i>	3 m.
12	Maria	 <i>P. Larraín</i>	3 m.
13	Dom dobry	 <i>W. Smarzowski</i>	2 m.
14	Flow	 <i>G. Zilbalodis</i>	2 m.
15	Padre no hay más que uno 5	 <i>S. Segura</i>	2 m.
16	Dracula: A Love Tale	 <i>L. Besson</i>	2 m.
17	The Salt Path	 <i>M. Elliott</i>	2 m.
18	Hvis ingen går i fella	 <i>H. Dahlsbakken</i>	2 m.
19	Rafadan Tayfa: Kapadokya	 <i>İ. Fidan</i>	2 m.
20	Ma mère, Dieu et Sylvie Vartan	 <i>K. Scott</i>	2 m.



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



In Japan, admissions mostly went to local films...



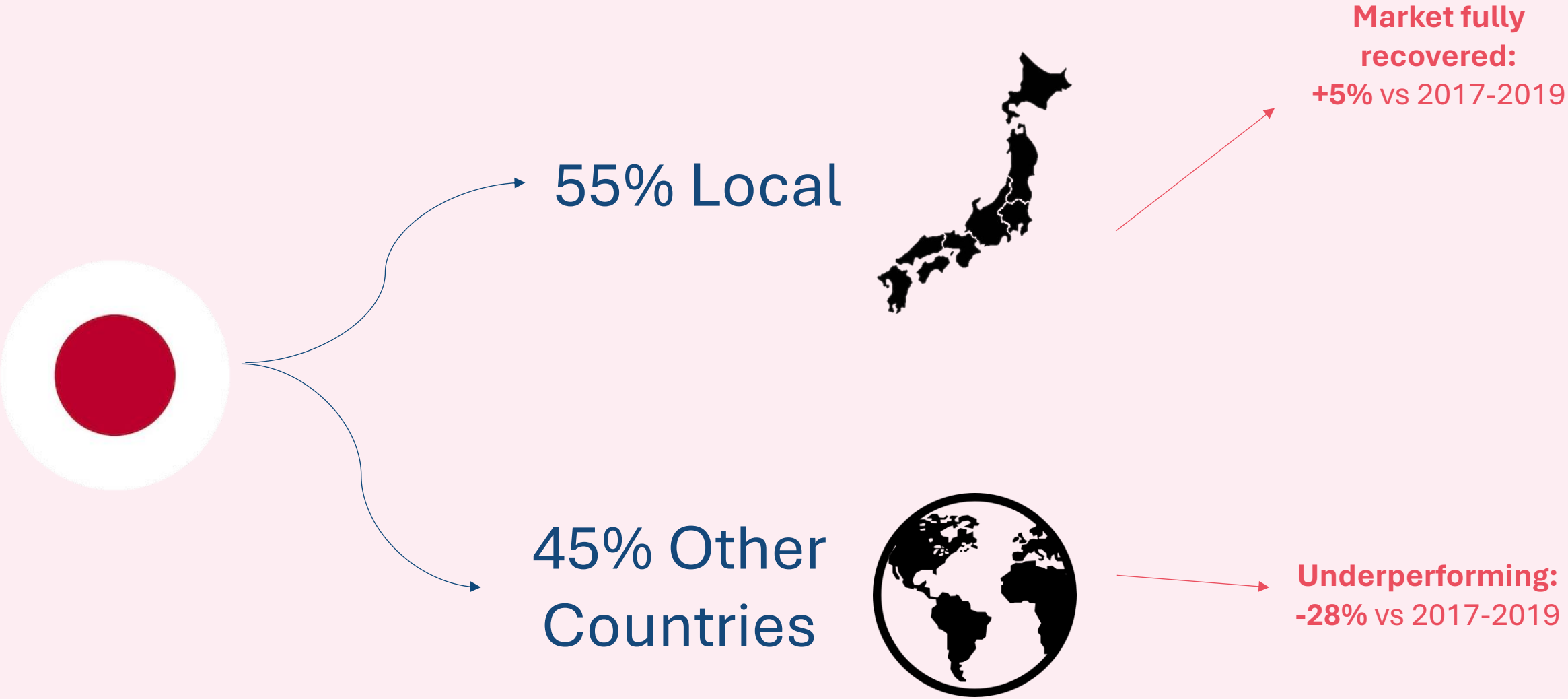
... as they were fueled both by successful animation and live-action films

Top 20 films in Japan, in 2025. Ranked by total admissions.

	Title	First country of origin, director	Sum of Admissions
1	Demon Slayer: Infinity Castle - Part 1	● H. Sotozaki, M. Ouse	26.6 m.
2	National Treasure (Kokuho)	● S. Lee	13.2 m.
3	Detective Conan: One-Eyed Flashback	● K. Shigehara	10.1 m.
4	Zootopia 2	🇺🇸 J. Bush, B. Howard	7.1 m.
5	Chainsaw Man - The Movie: Reze Arc	● T. Yoshihara	6.6 m.
6	Tokyo Mer the Movie: Nankai Mission	● A. Matsuki	3.9 m.
7	Doraemon: Nobita's Art World Tales	● Y. Teramoto	3.9 m.
8	Exit 8	● G. Kawamura	3.6 m.
9	Mission: Impossible - The Final Reckoning	🇺🇸 C. McQuarrie	3.4 m.
10	Jurassic World: Rebirth	🇺🇸 G. Edwards	3.2 m.
11	Minecraft	🇺🇸 J. Hess	3 m.
12	Lilo & Stitch	🇺🇸 D. Fleischer-Camp	2.4 m.
13	La Grande Maison Paris	● A. Tsukahara	2.3 m.
14	Wicked	● J. Chu	2.2 m.
15	Mobile Suit Gundam GQuuuuuuX: Beginning	● K. Tsurumaki	2.2 m.
16	Cells at Work	● H. Takeuchi	2.1 m.
17	Suzuki=Bakudan	● A. Nagai	2.1 m.
18	366 Days	● T. Shinjo	2 m.
19	1st Kiss	● A. Tsukahara	2 m.
20	Crayon Shin-chan the Movie: Super Hot!	● M. Hashimoto	1.9 m.



Japanese films – where do they sell tickets?

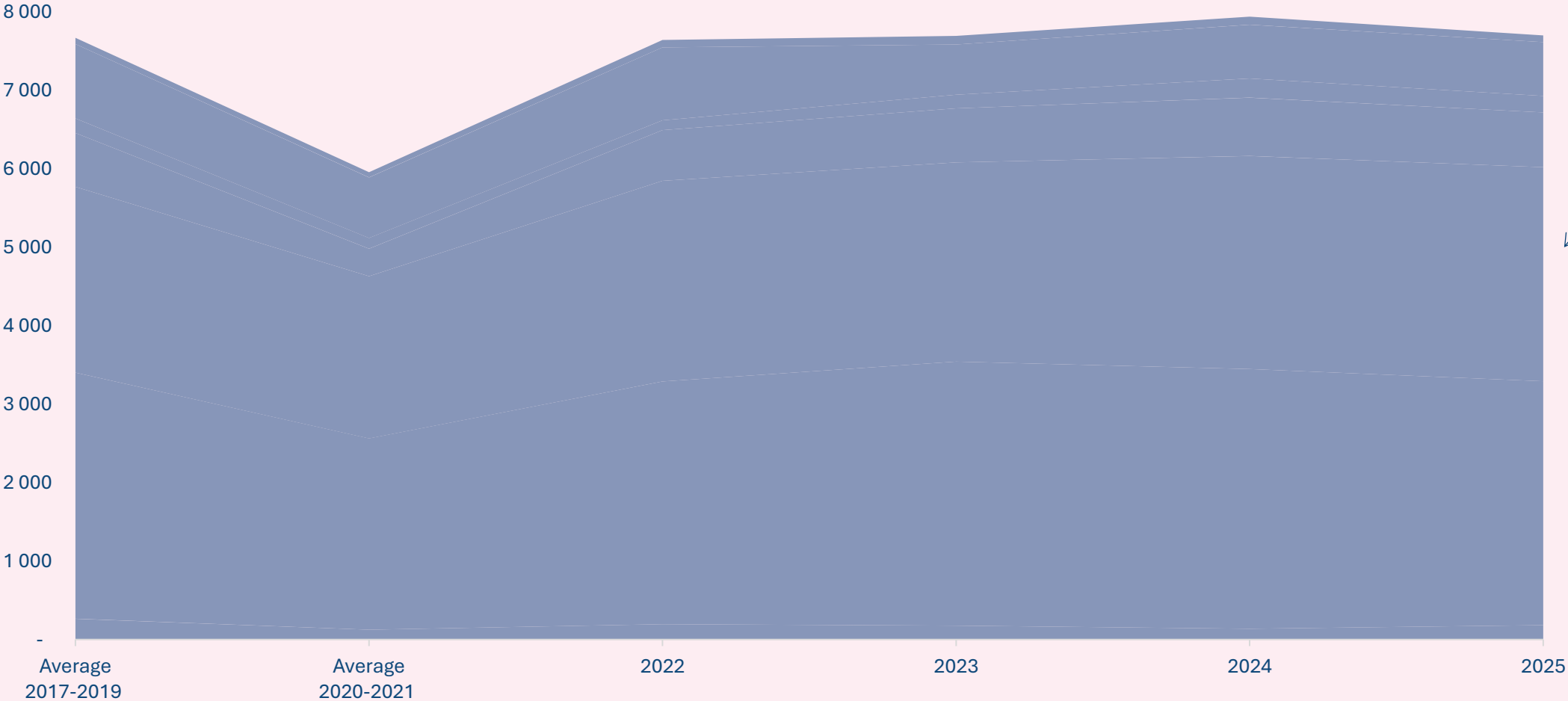


The background of the slide features a repeating pattern of horizontal, wavy lines in a light pink color against a white background. The waves are smooth and rhythmic, creating a decorative border effect.

04 How did film production evolve?

Theatrical film production recovered quickly from the pandemic-related setback...

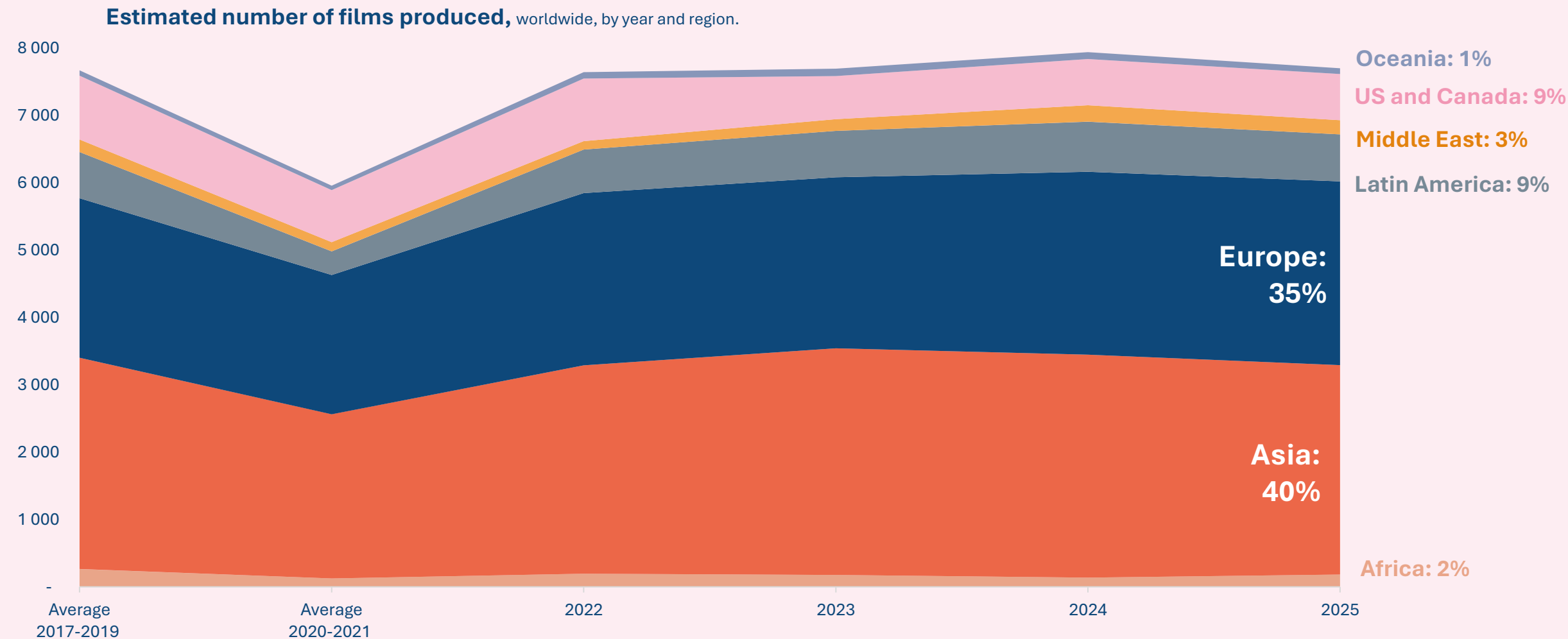
Estimated number of films produced, worldwide, by year.



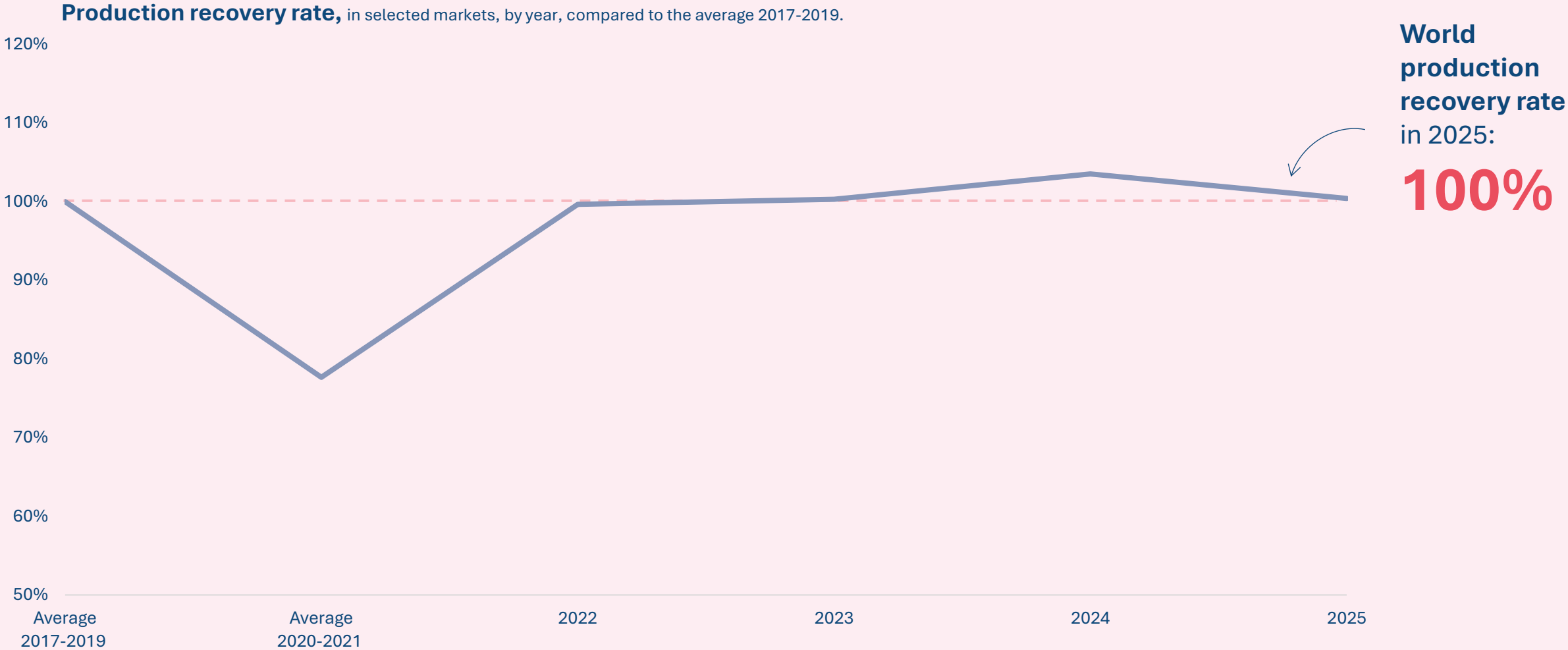
Estimated
7 707
films produced
worldwide in
2025.

Estimated
2 500
films produced in
Europe in
2025.

... driven by Asian and European countries, accounting for 40% and 35% of global production volume respectively

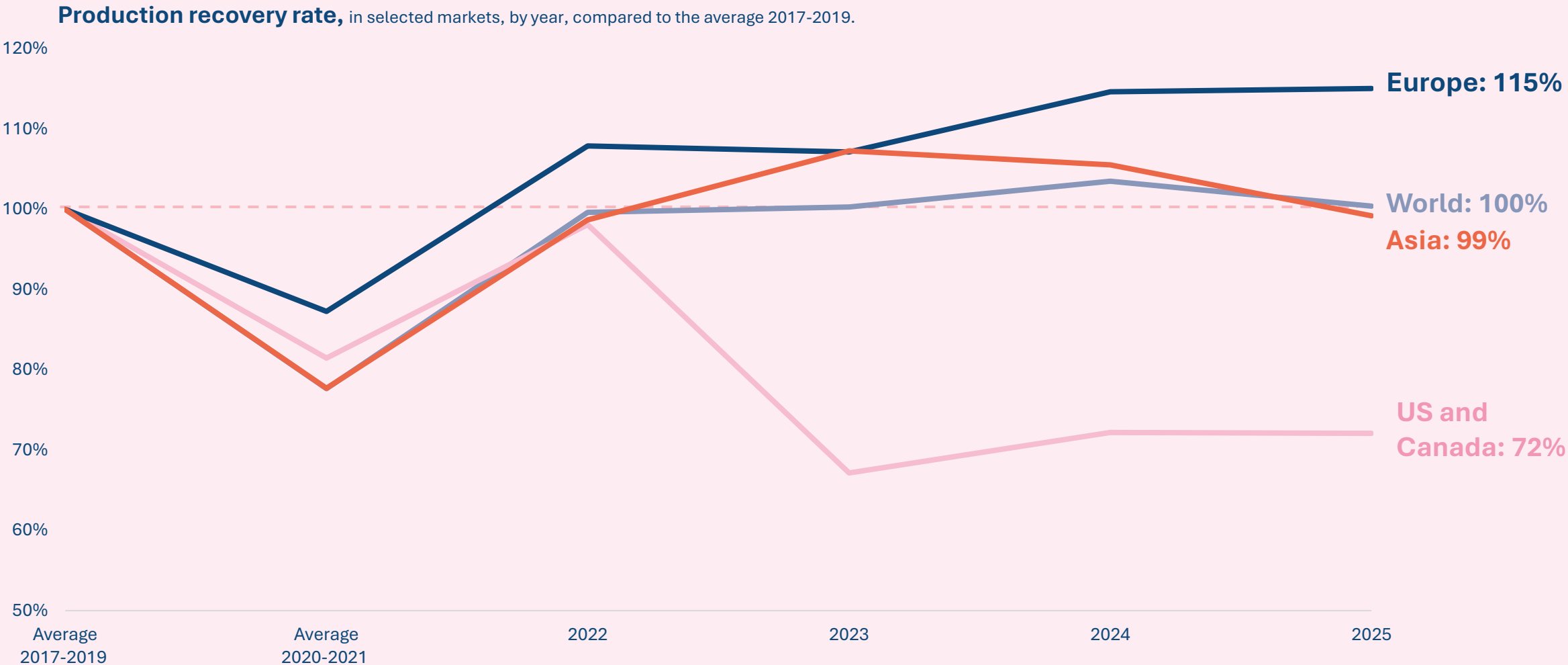


Significant differences between regions in terms of production...

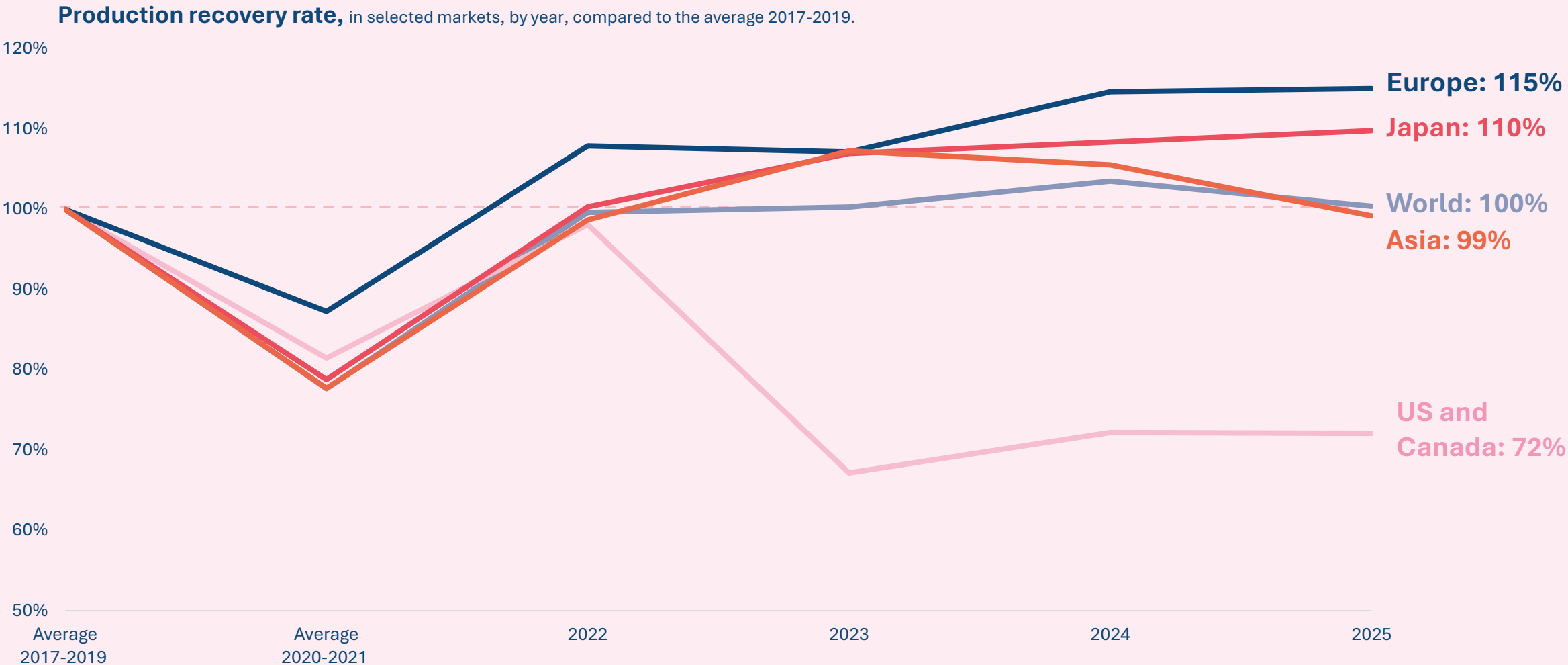


Source: European Audiovisual Observatory.

Significant differences between regions in terms of production...

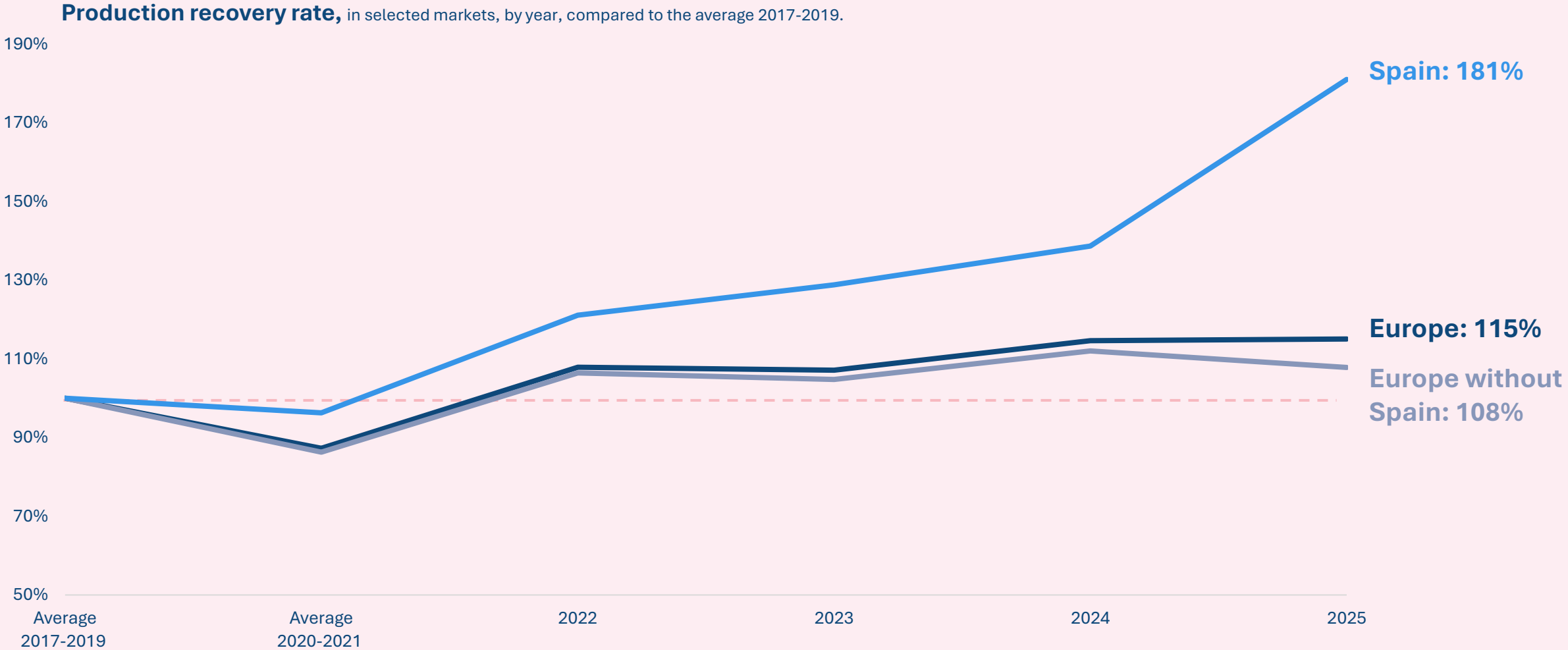


... with some regions even exceeding pre-pandemic levels in 2025

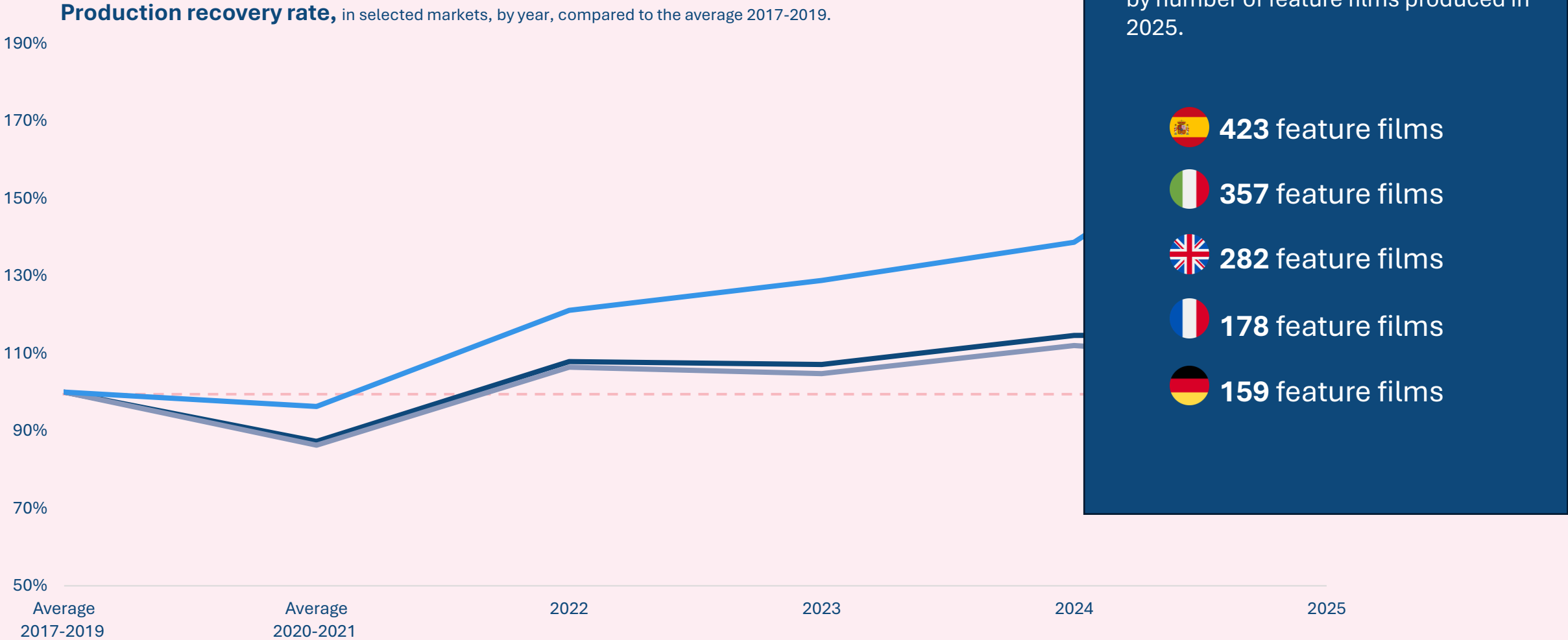


Source: European Audiovisual Observatory.

Europe’s growth in 2025 was driven by Spain...



Europe’s growth in 2025 was driven by Spain, the first production country in the region



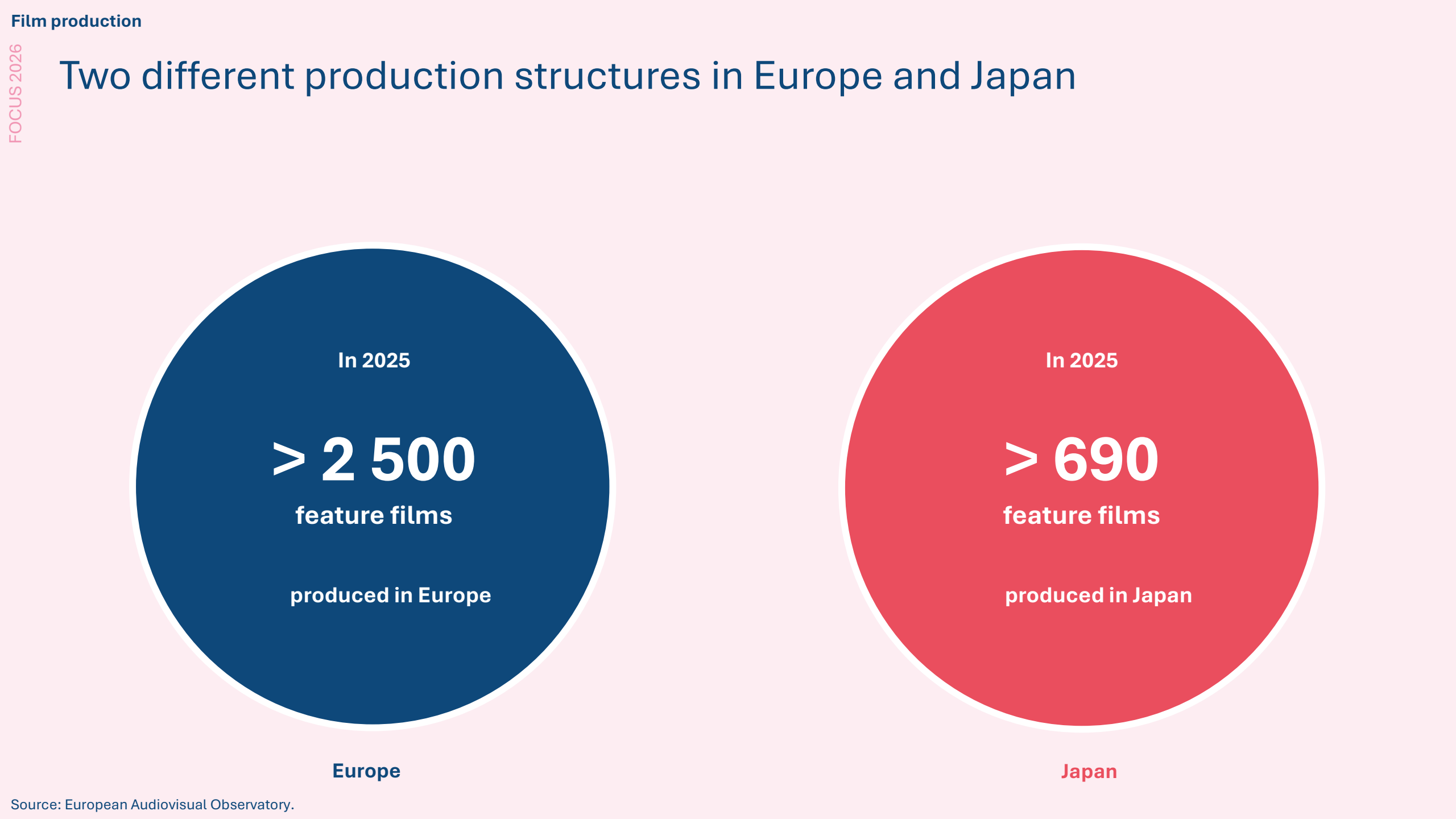
Top 5 world and European countries in terms of production

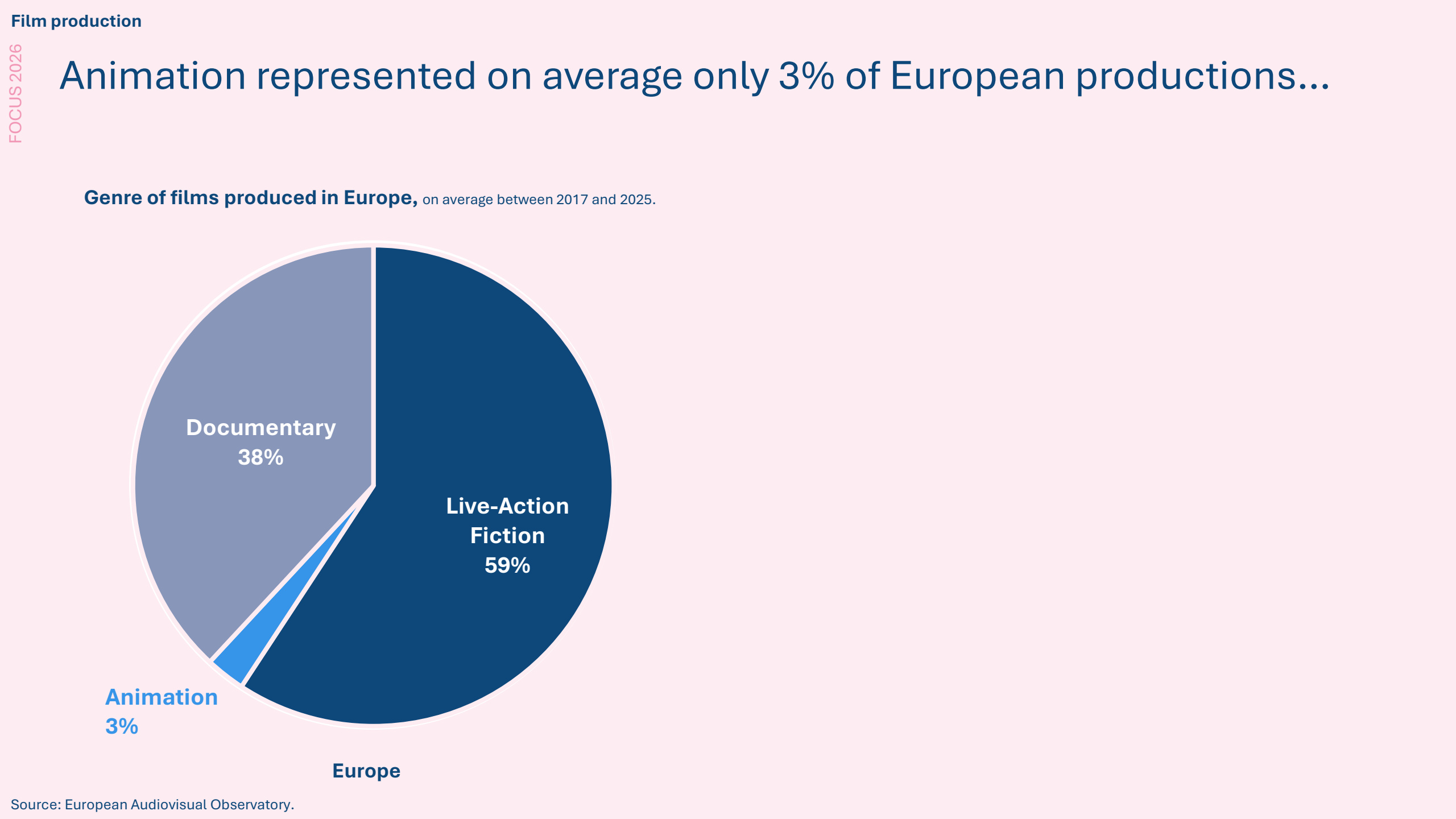
Top European countries, by number of feature films produced in 2025.

-  **423** feature films
-  **357** feature films
-  **282** feature films
-  **178** feature films
-  **159** feature films

Top World countries, by number of feature films produced in 2025.

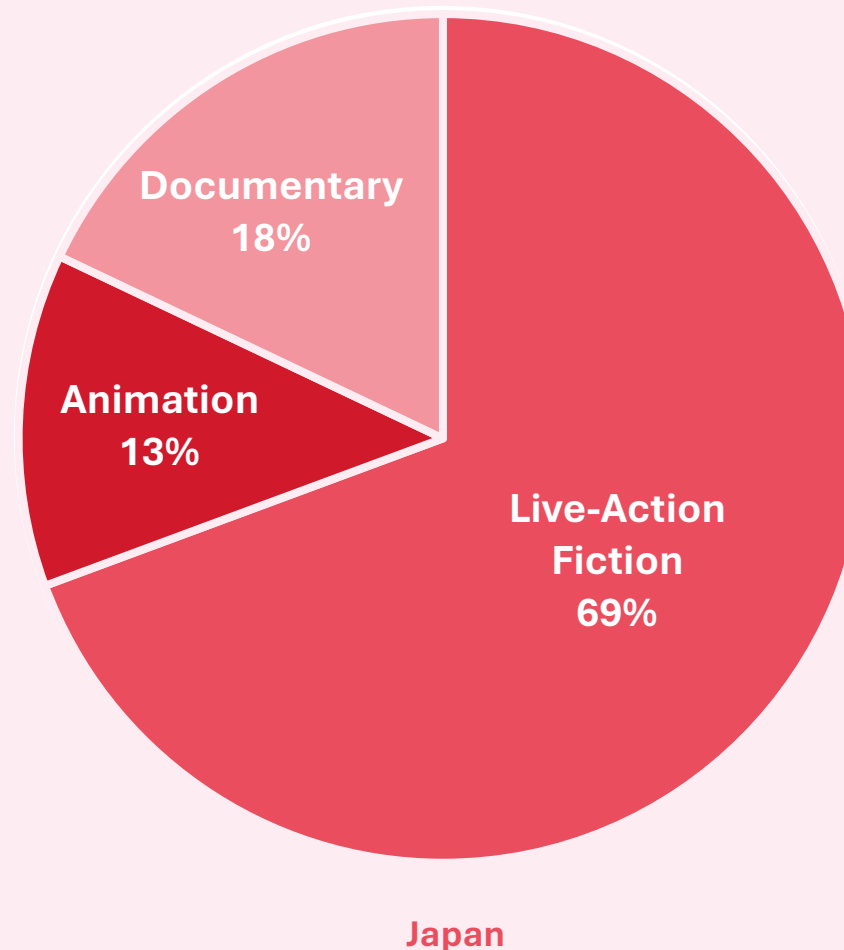
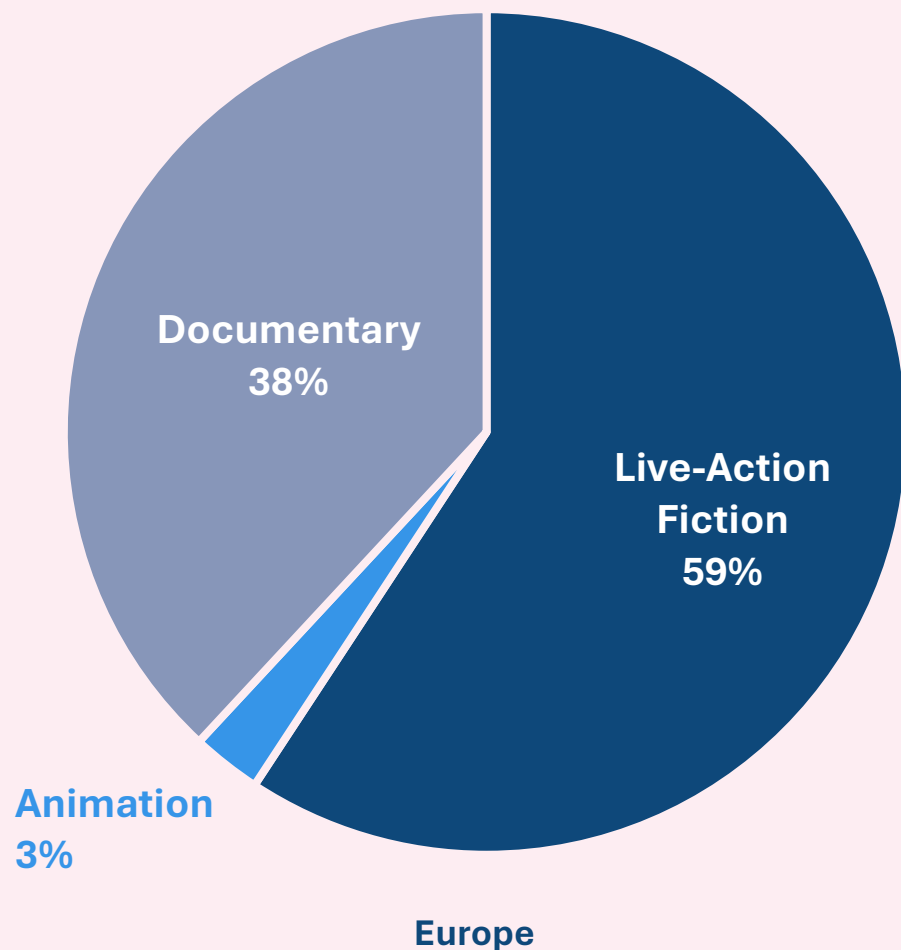
-  **768** feature films
-  **694** feature films
-  **544** feature films (in 2024)
-  **539** feature films
-  **511** feature films

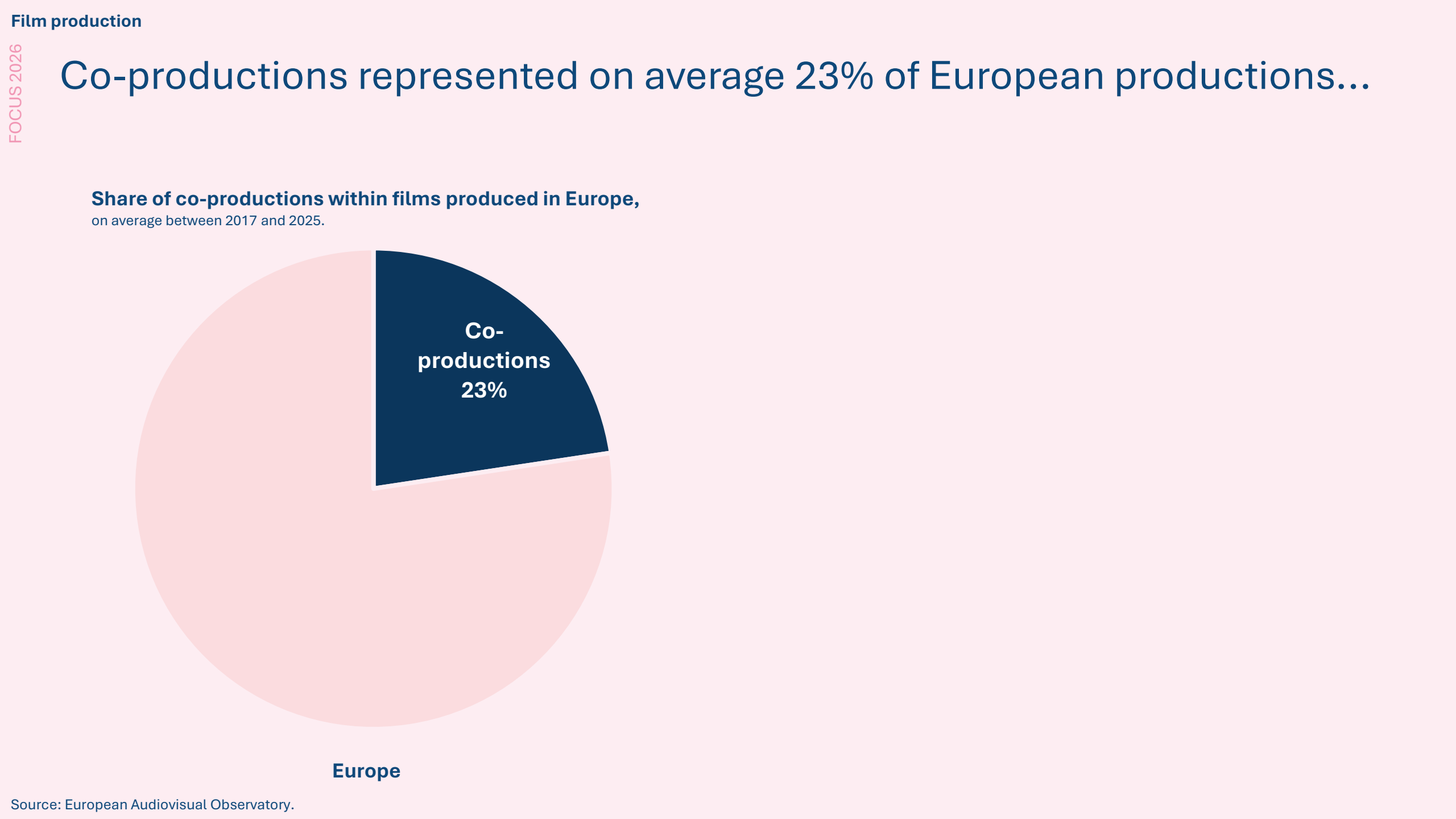




Animation represented on average only 3% of European productions, and 13% in Japan

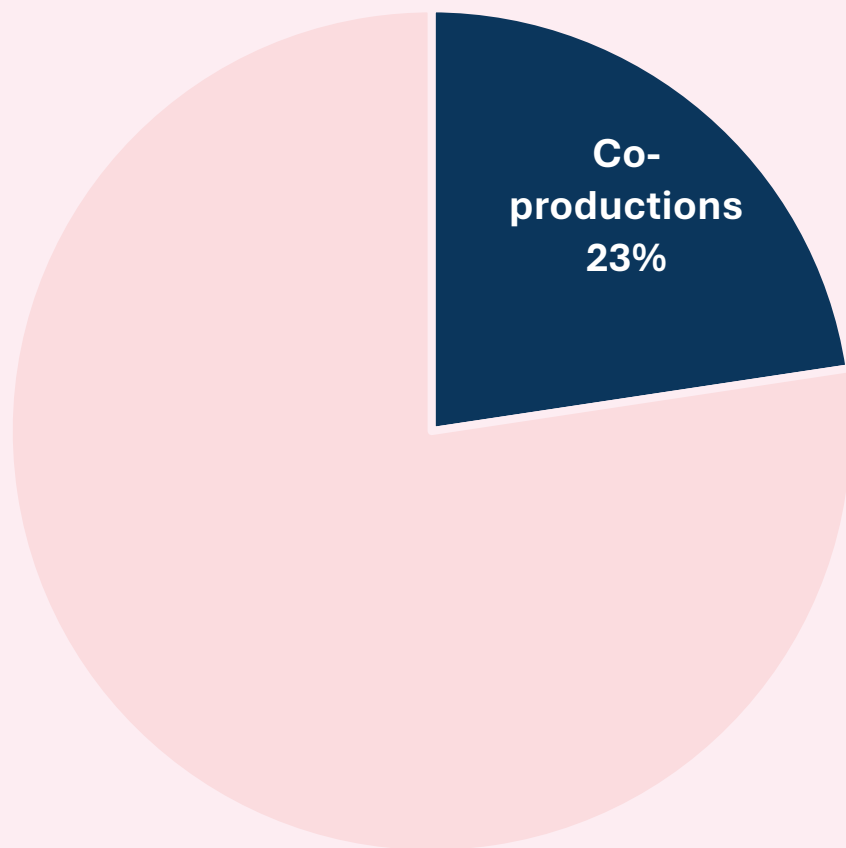
Genre of films produced in Europe and Japan, on average between 2017 and 2025.





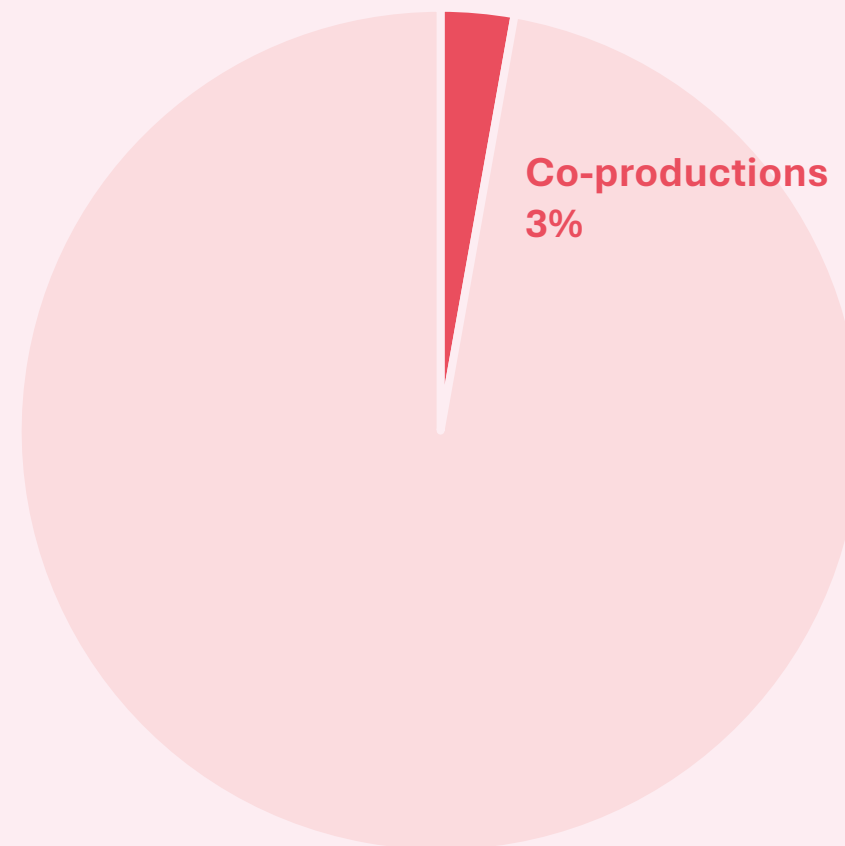
Co-productions represented on average 23% of European productions, and 3% of Japanese films released.

Share of co-productions within films produced in Europe,
on average between 2017 and 2025.



Europe

Share of co-productions within Japanese films released in Japan, in 2025.



Japan

Co-productions represented on average 23% of European productions, and 3% of Japanese films released



Candlestick

(2025)
JP | TW
18 000 admissions in Japan in 2025



(Love Song)

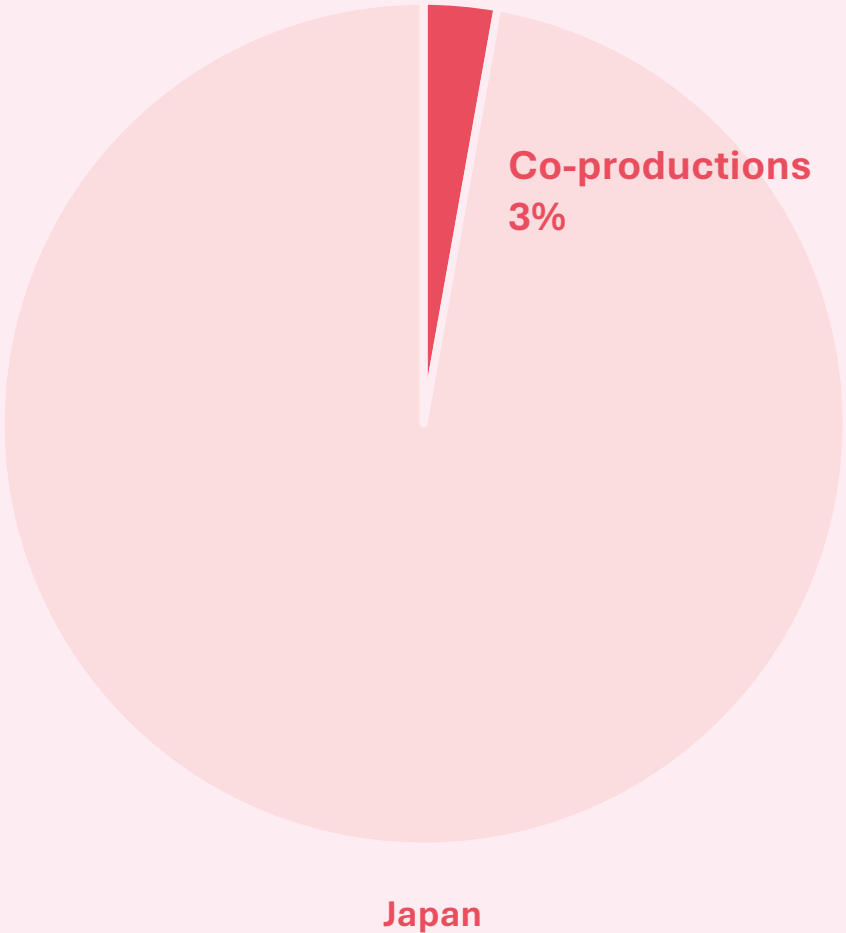
(2025)
JP | TH
291 000 admissions in Japan in 2025



Renoir

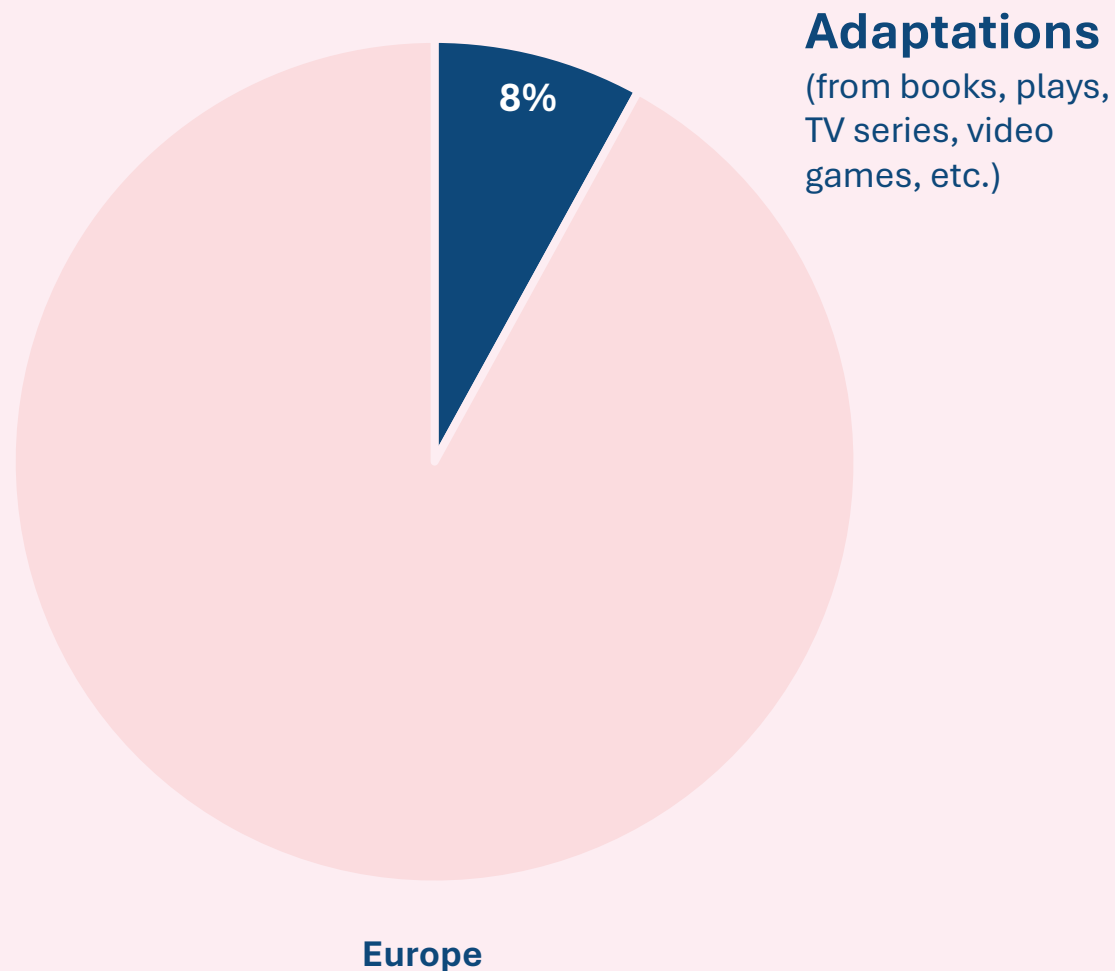
(2025)
JP | FR | SG | PH | ID | QA | US
68 000 admissions in Japan in 2025

Share of co-productions within Japanese films released in Japan, in 2025.



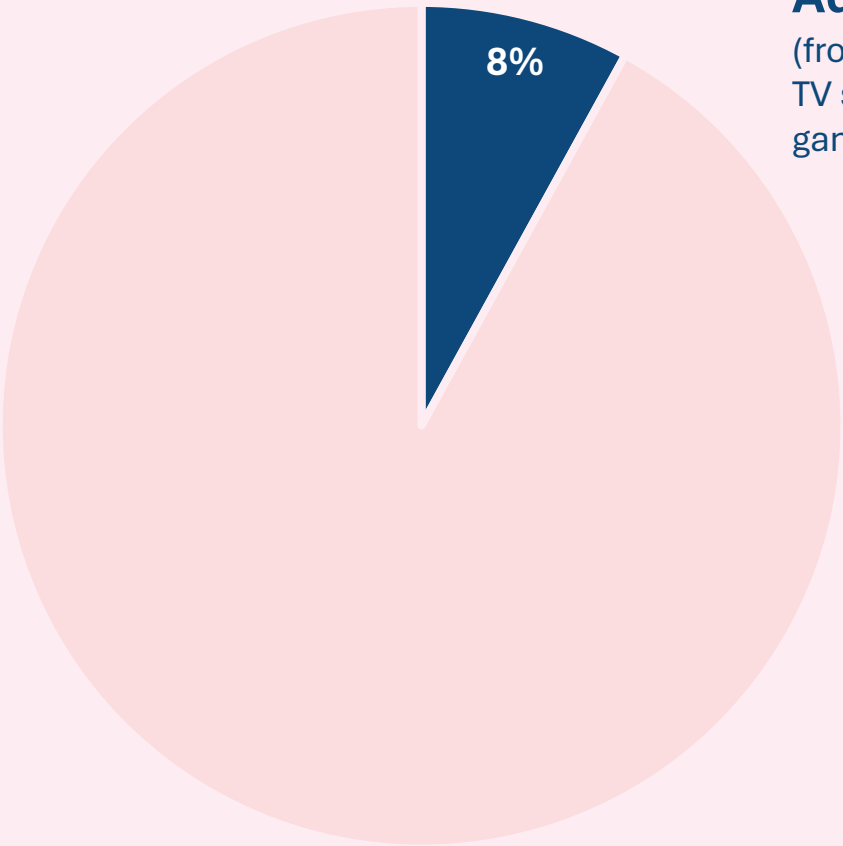
Adaptations represented only 8% of films produced in Europe...

Share of adaptations within films produced in Europe,
on average between 2015 and 2024.



Adaptations represented only 8% of films produced in Europe, but a large share of Japan’s box office

Share of adaptations within films produced in Europe, on average between 2015 and 2024.



Adaptations
(from books, plays, TV series, video games, etc.)

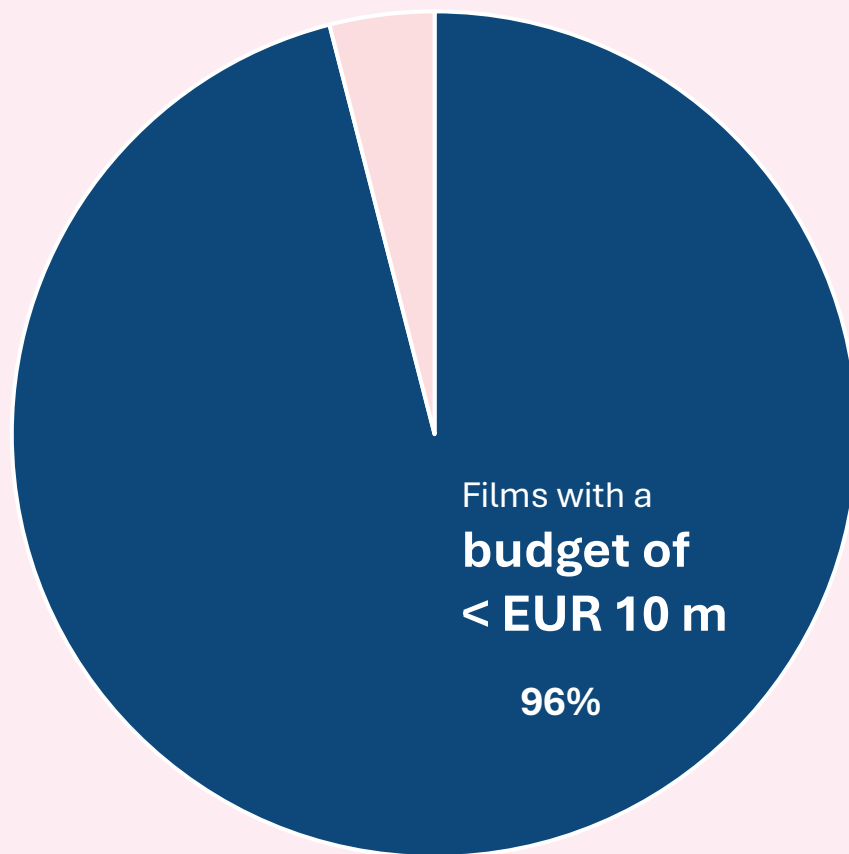
Europe

	Title	First country of origin, director	Sum of Admissions
1	Demon Slayer: Infinity Castle - Part 1	● H. Sotozaki, M. Ouse	26.6 m.
2	National Treasure (Kokuho)	● S. Lee	13.2 m.
3	Detective Conan: One-Eyed Flashback	● K. Shigehara	10.1 m.
4	Zootopia 2	🇺🇸 J. Bush, B. Howard	7.1 m.
5	Chainsaw Man - The Movie: Reze Arc	● T. Yoshihara	6.6 m.
6	Tokyo Mer the Movie: Nankai Mission	● A. Matsuki	3.9 m.
7	Doraemon: Nobita's Art World Tales	● Y. Teramoto	3.9 m.
8	Exit 8	● G. Kawamura	3.6 m.
9	Mission: Impossible - The Final Reckoning	🇺🇸 C. McQuarrie	3.4 m.
10	Jurassic World: Rebirth	🇺🇸 G. Edwards	3.2 m.
11	Minecraft	🇺🇸 J. Hess	3 m.
12	Lilo & Stitch	🇺🇸 D. Fleischer-Camp	2.4 m.
13	La Grande Maison Paris	● A. Tsukahara	2.3 m.
14	Wicked	● J. Chu	2.2 m.
15	Mobile Suit Gundam GQuuuuuuX: Beginning	● K. Tsurumaki	2.2 m.
16	Cells at Work	● H. Takeuchi	2.1 m.
17	Suzuki=Bakudan	● A. Nagai	2.1 m.
18	366 Days	● T. Shinjo	2 m.
19	1st Kiss	● A. Tsukahara	2 m.
20	Crayon Shin-chan the Movie: Super Hot!	● M. Hashimoto	1.9 m.

Japan

Most films produced in Europe had a budget under EUR 10 million

Share of films produced in Europe with a budget under EUR 10 million, on average in 2023.



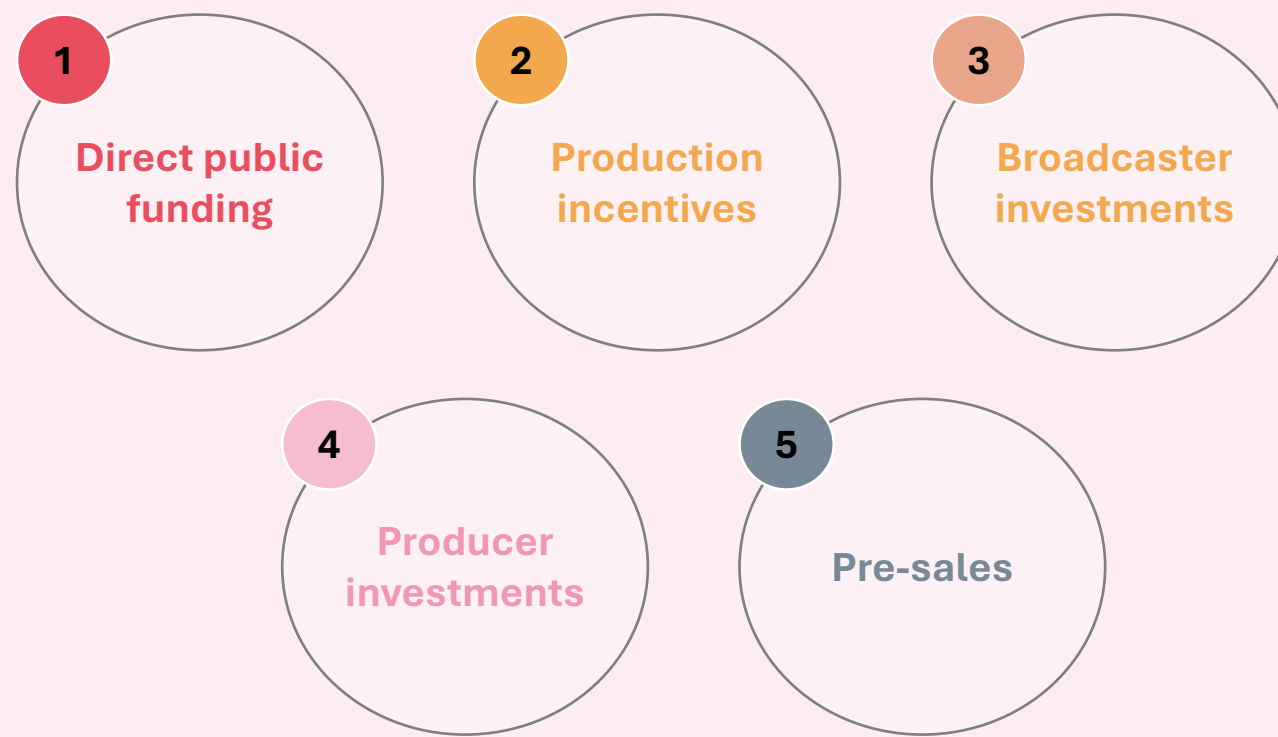
Europe

Median budget of a European film:

**EUR 2.17
million**

Financing model of European films is based on 5 main financing sources

Financed with five essential financing sources



Median budget of a European film:

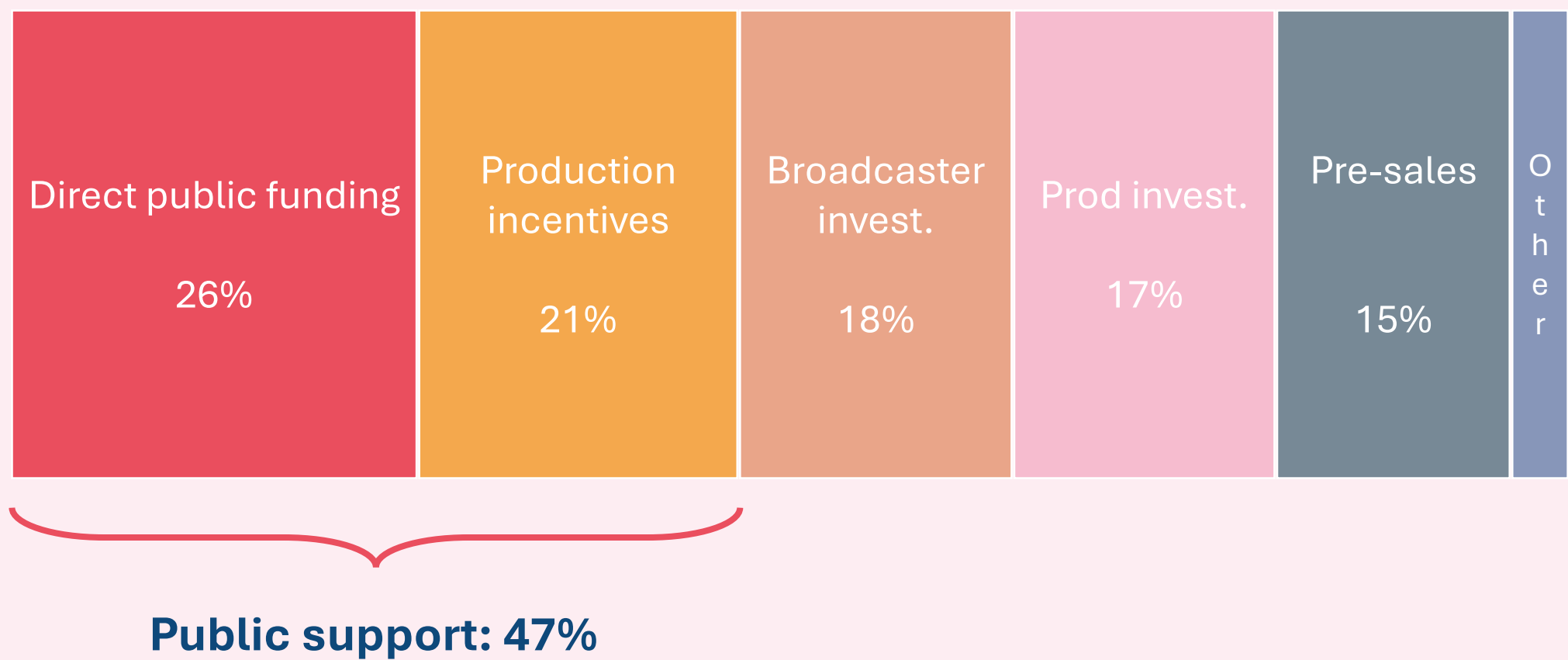
EUR 2.17
million

Film production

FOCUS 2026

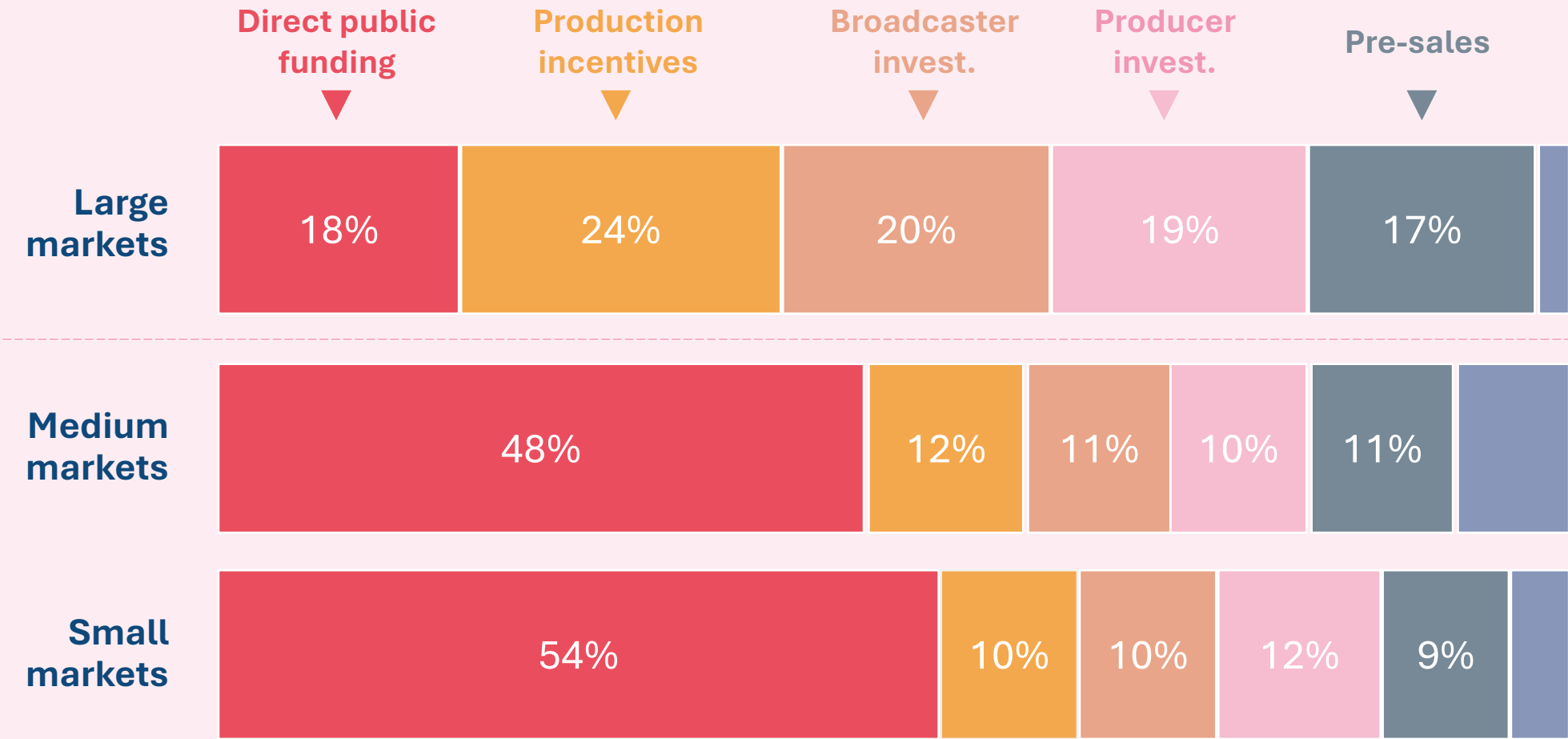
Nearly 50% of the production costs of European fiction films are financed through public support...

Estimated breakdown of cumulative production cost of European fiction films, on average in 2023



... with direct public funding playing a much more important role in small and medium-sized markets.

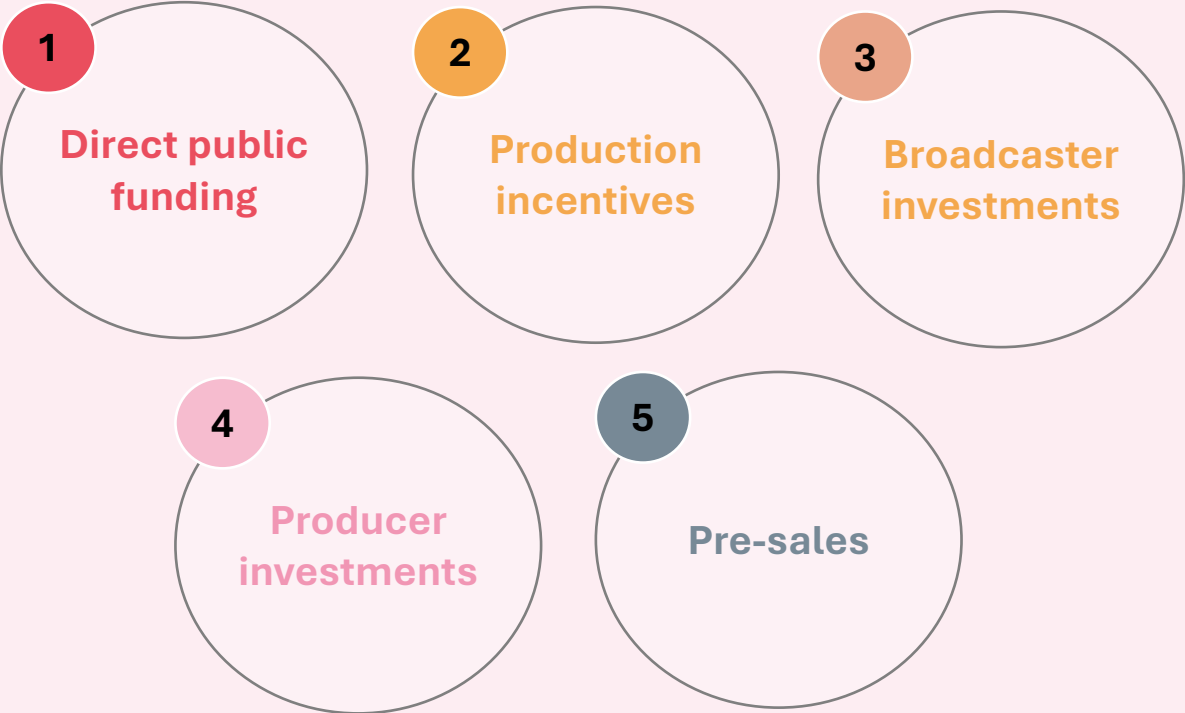
Estimated breakdown of cumulative production cost of European fiction films, 2023



The film financing models in Europe and Japan

Europe

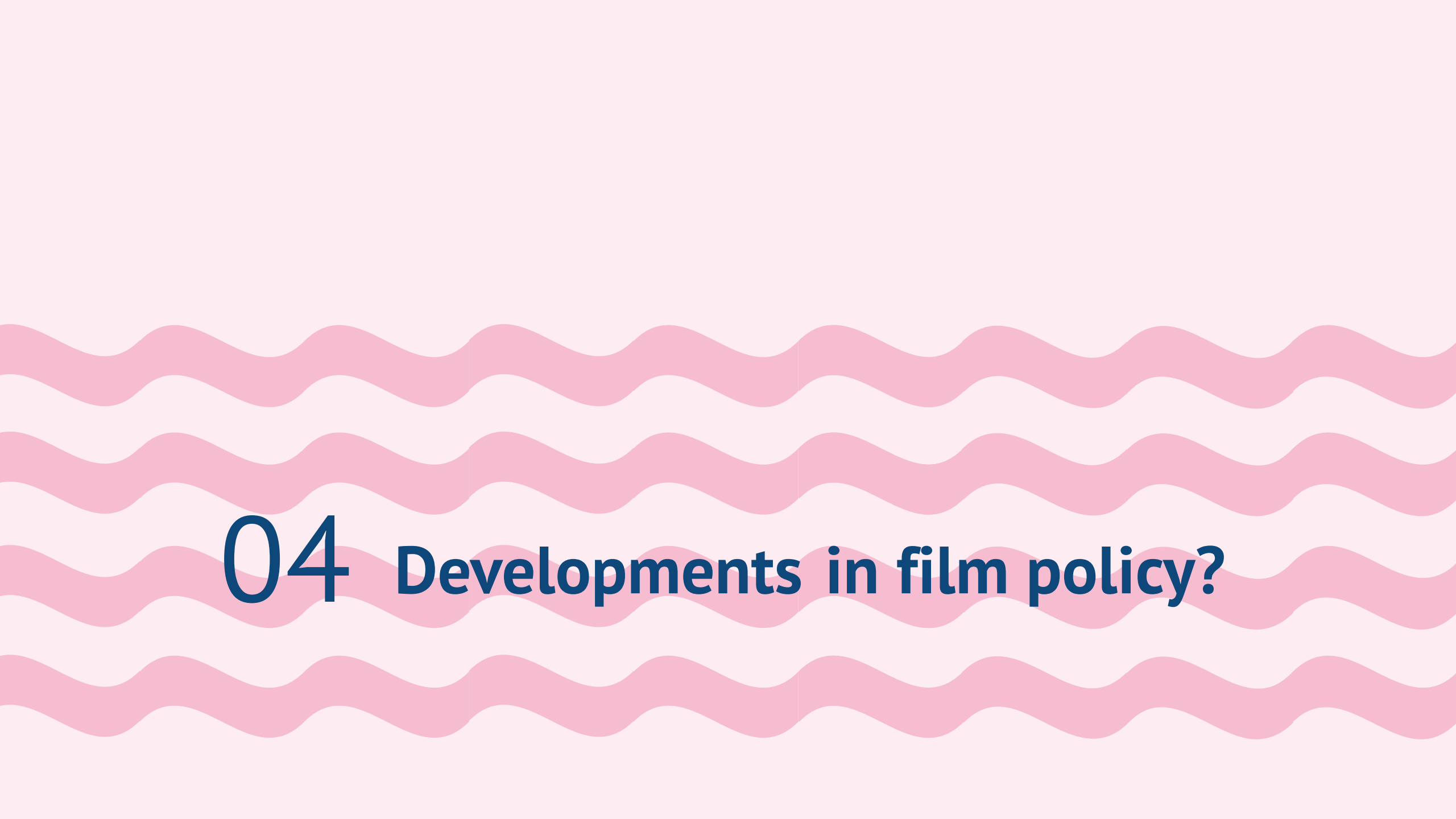
Financed with five essential financing sources.
Dependence on public financing.



Japan

A market-financed system.
Traditional production committee system.



The background of the slide features a repeating pattern of horizontal, wavy lines in a light pink color against a white background. The waves are smooth and rhythmic, creating a decorative border effect.

04 Developments in film policy?

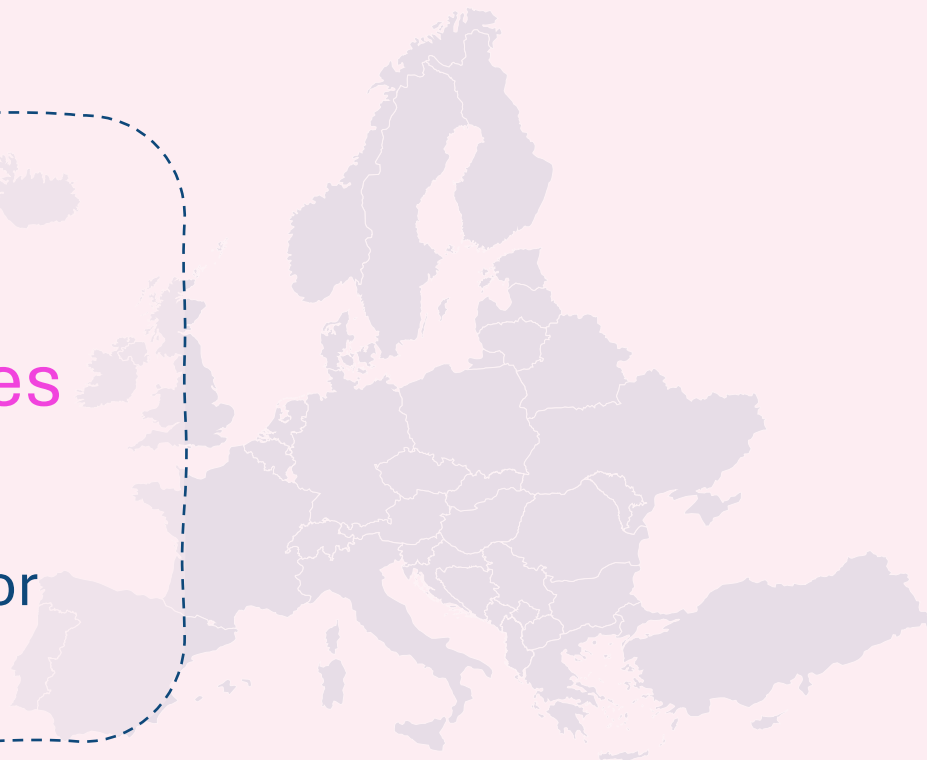
Developments



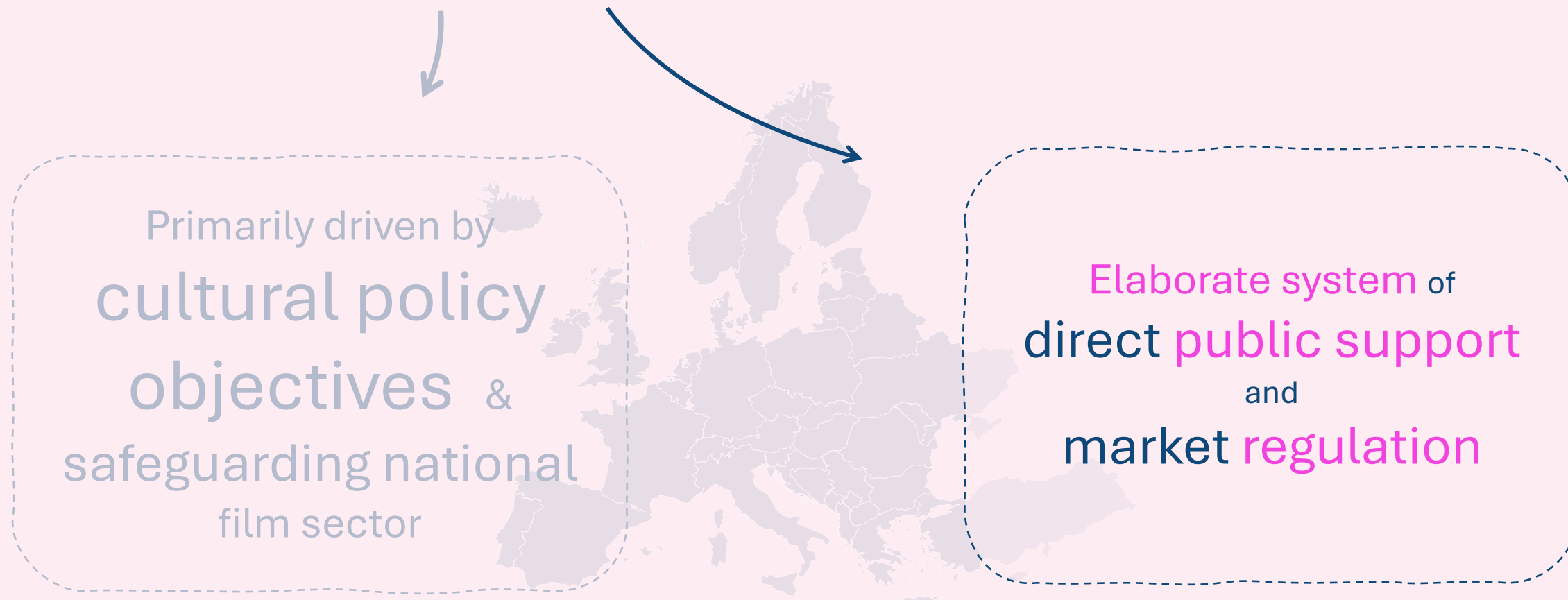
Two core characteristics of most European film policies ...



Primarily driven by
cultural objectives
& safeguarding
national film sector

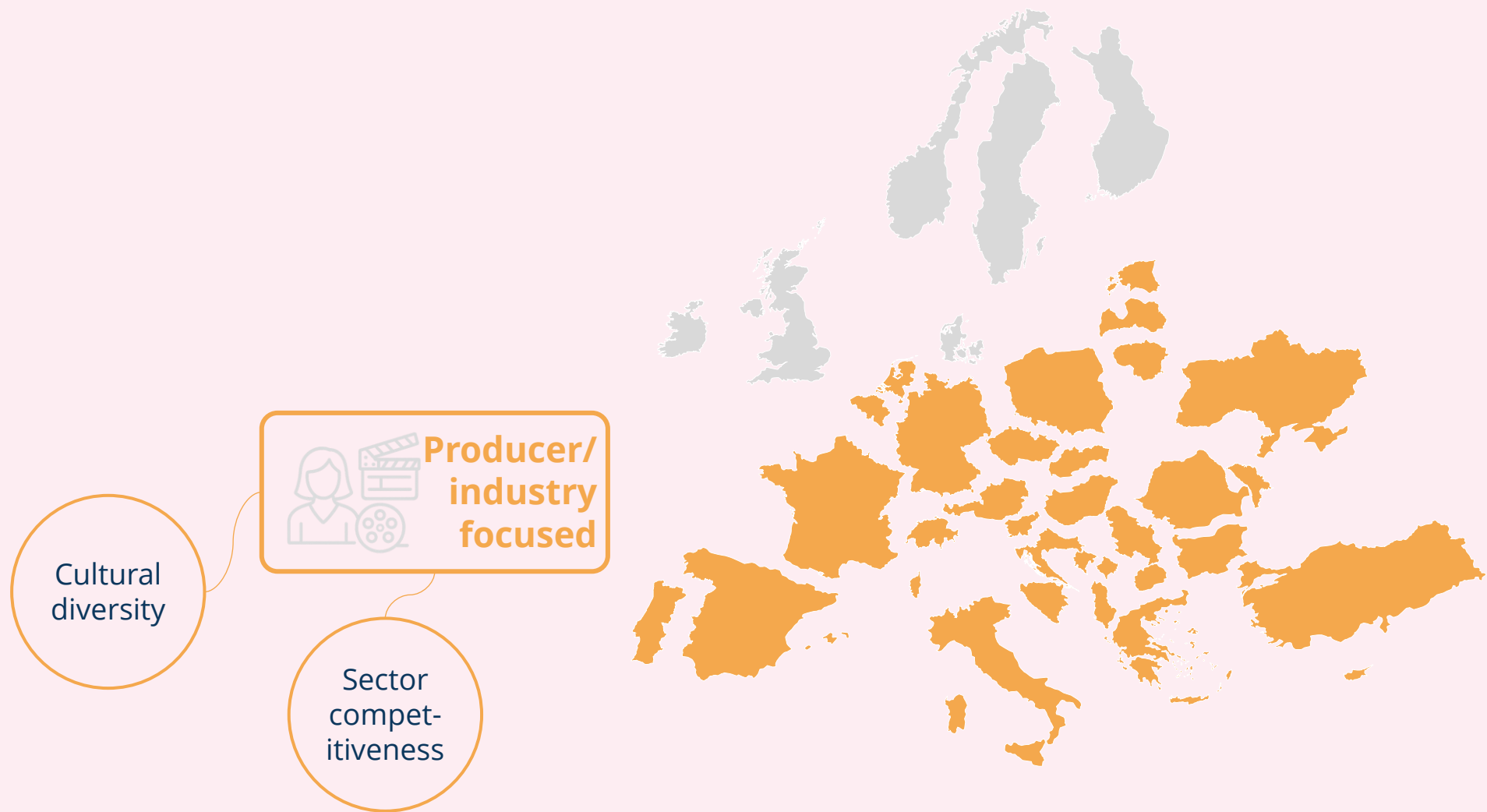


Two core characteristics of most European film policies ...

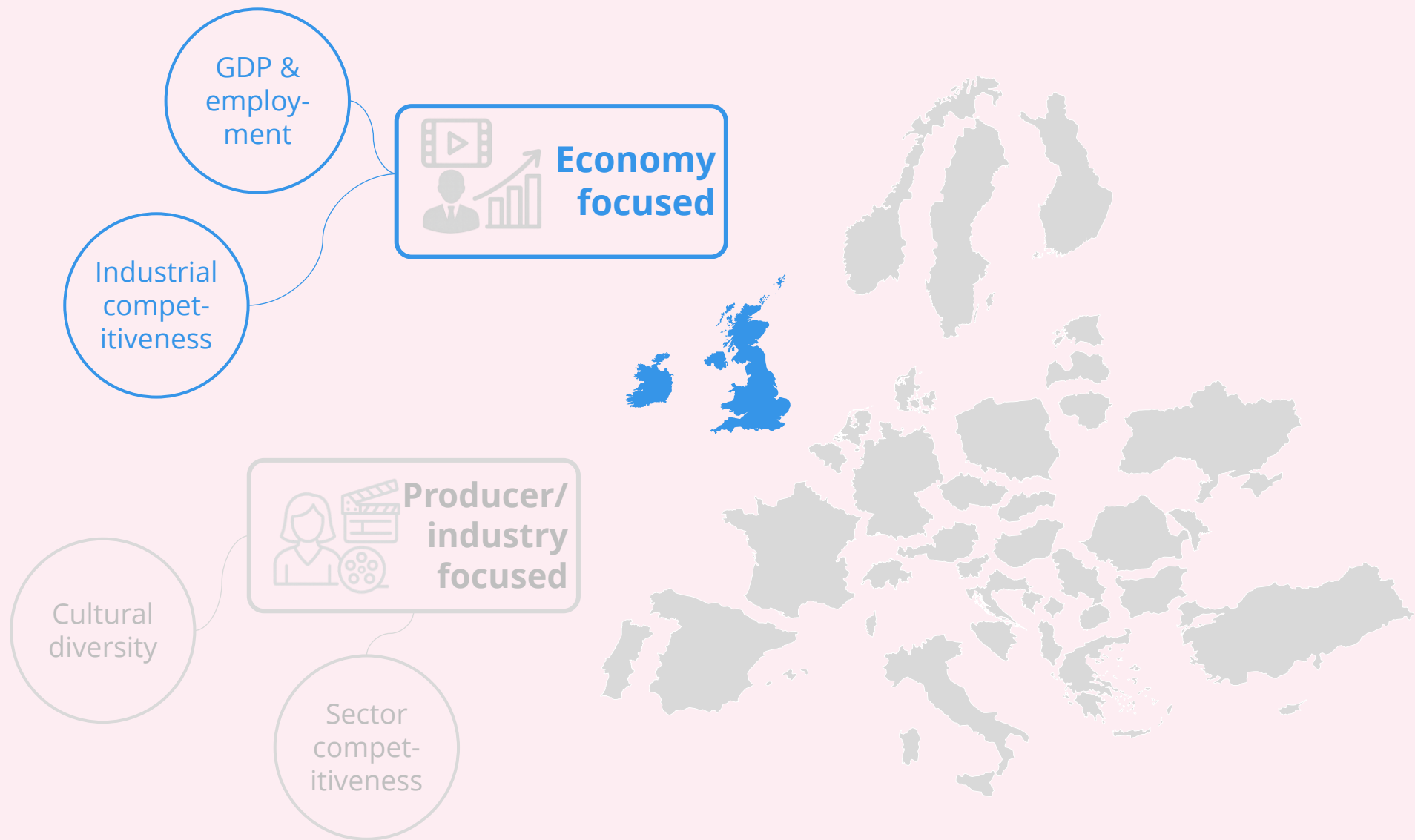




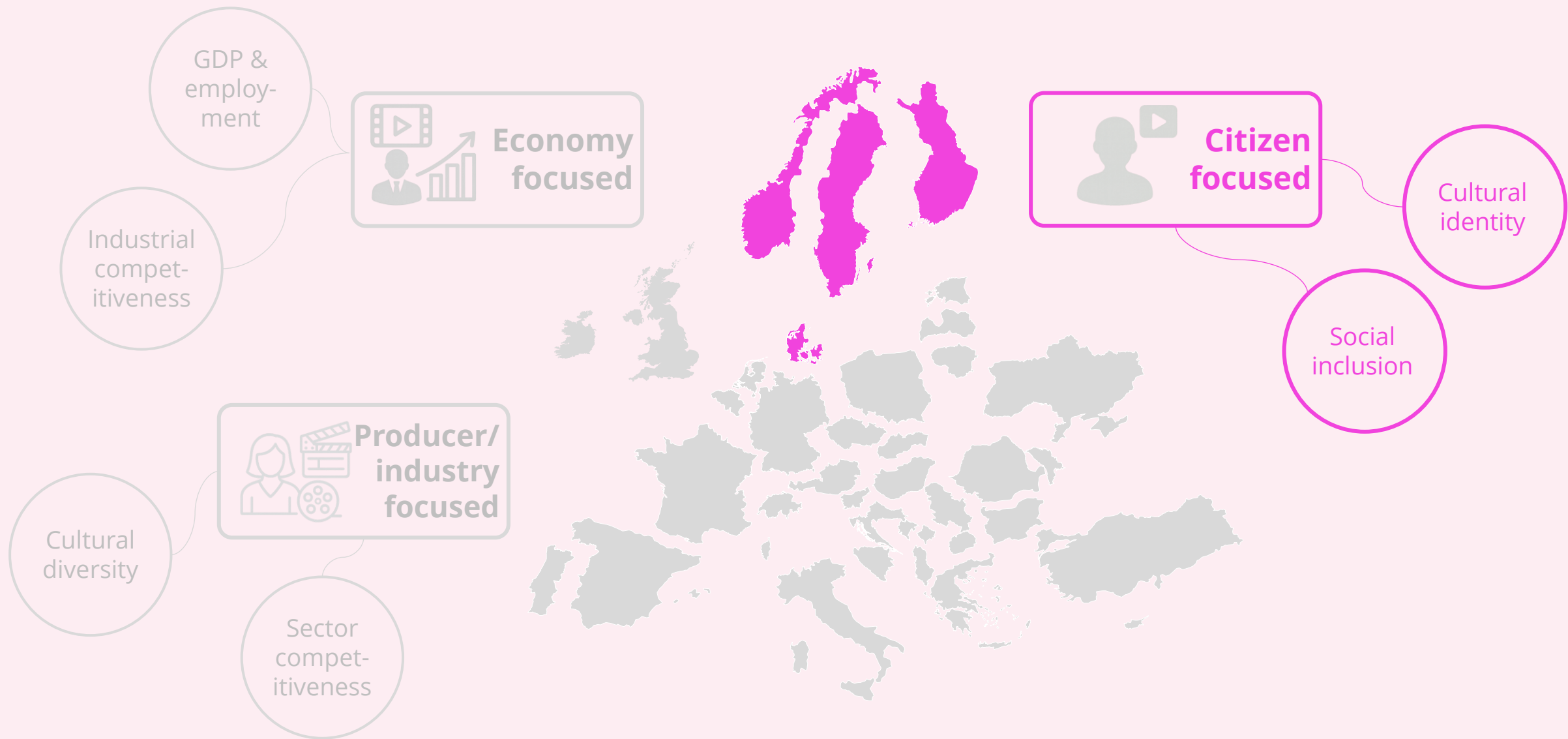
Film policies differ in terms of **policy rationales**



Film policies differ in terms of policy rationales

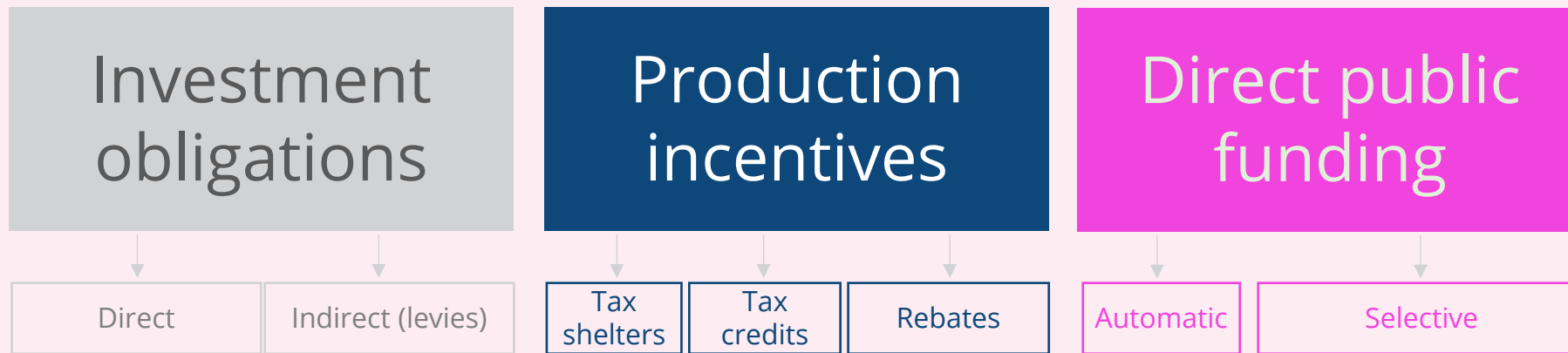


Film policies differ in terms of policy rationales

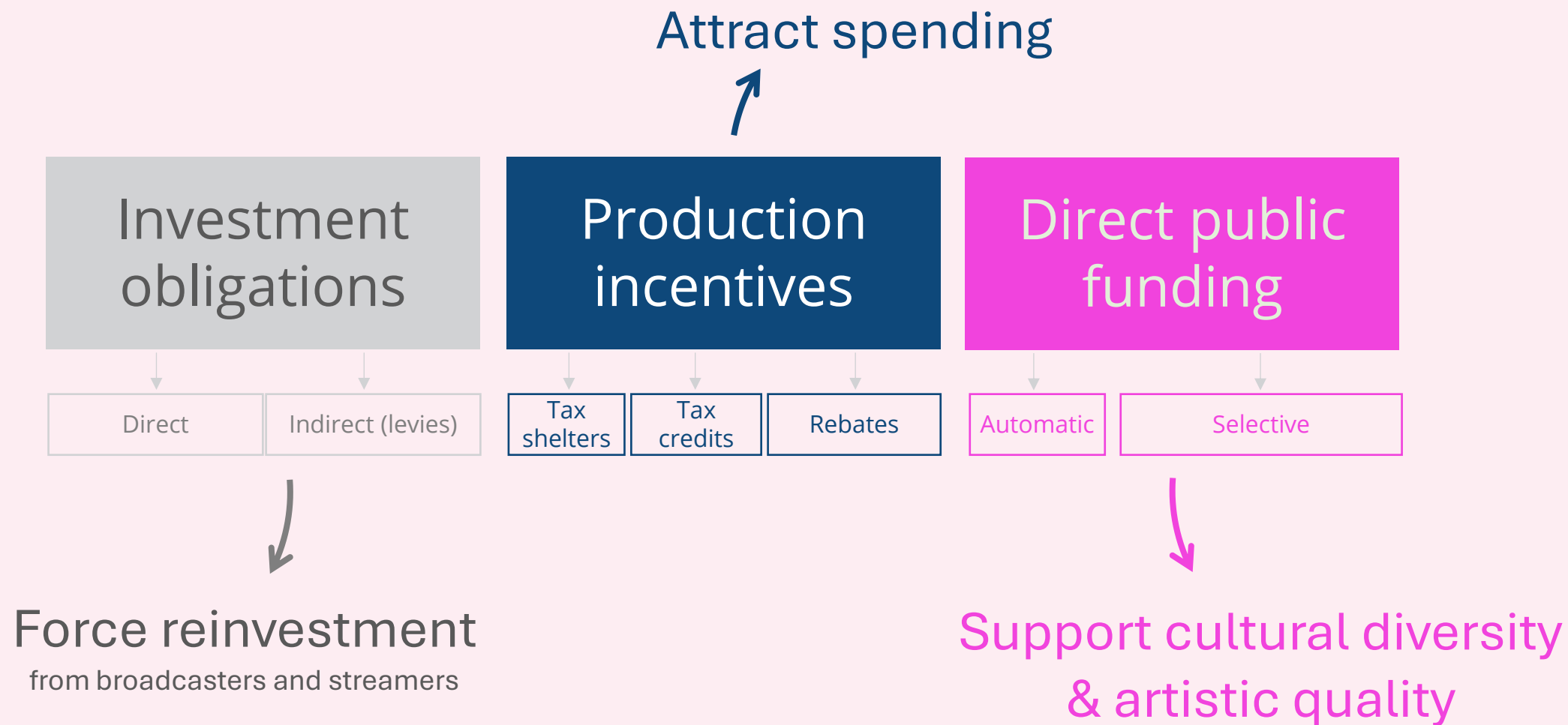




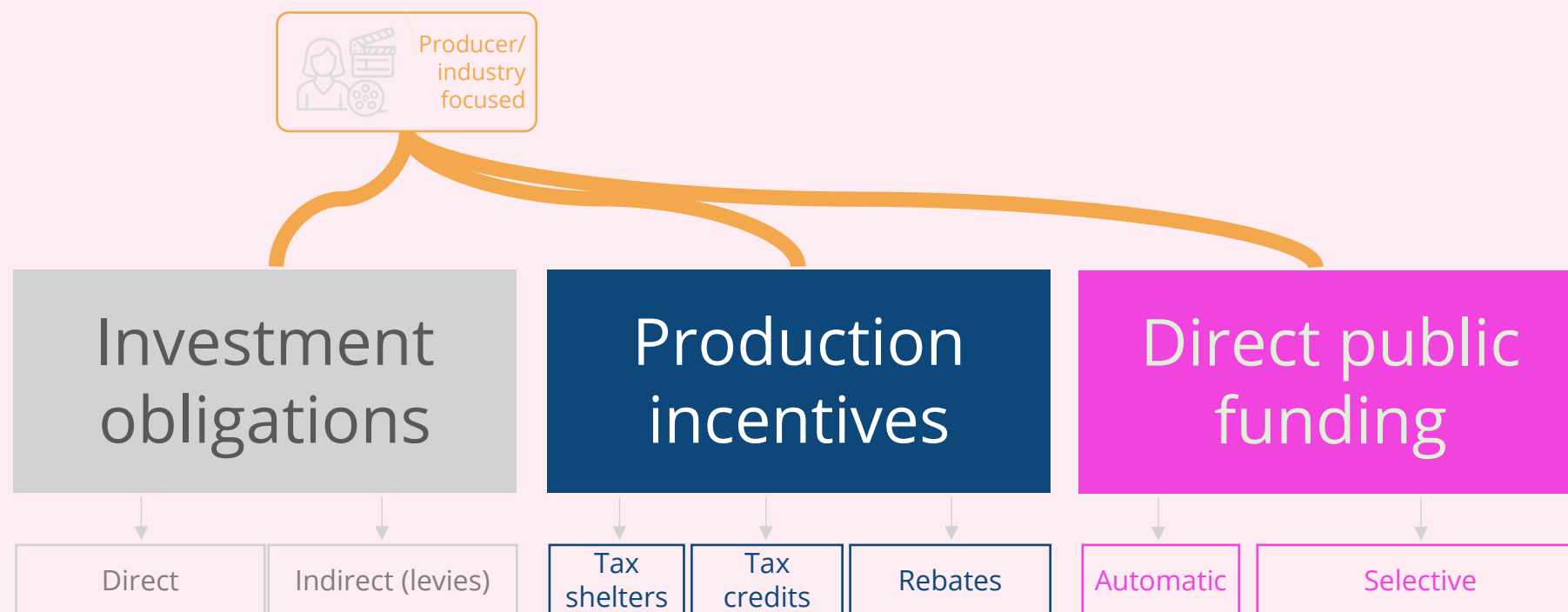
Three main film & audiovisual policy tools ...



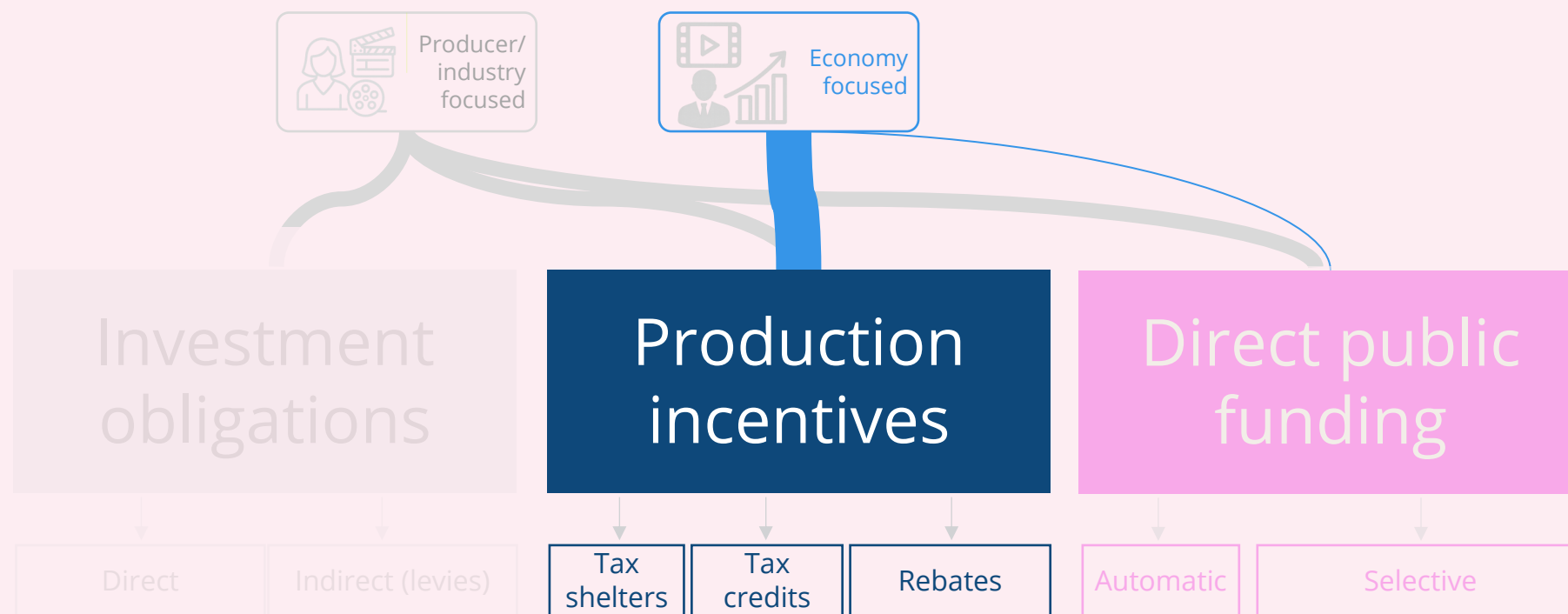
... with different purposes



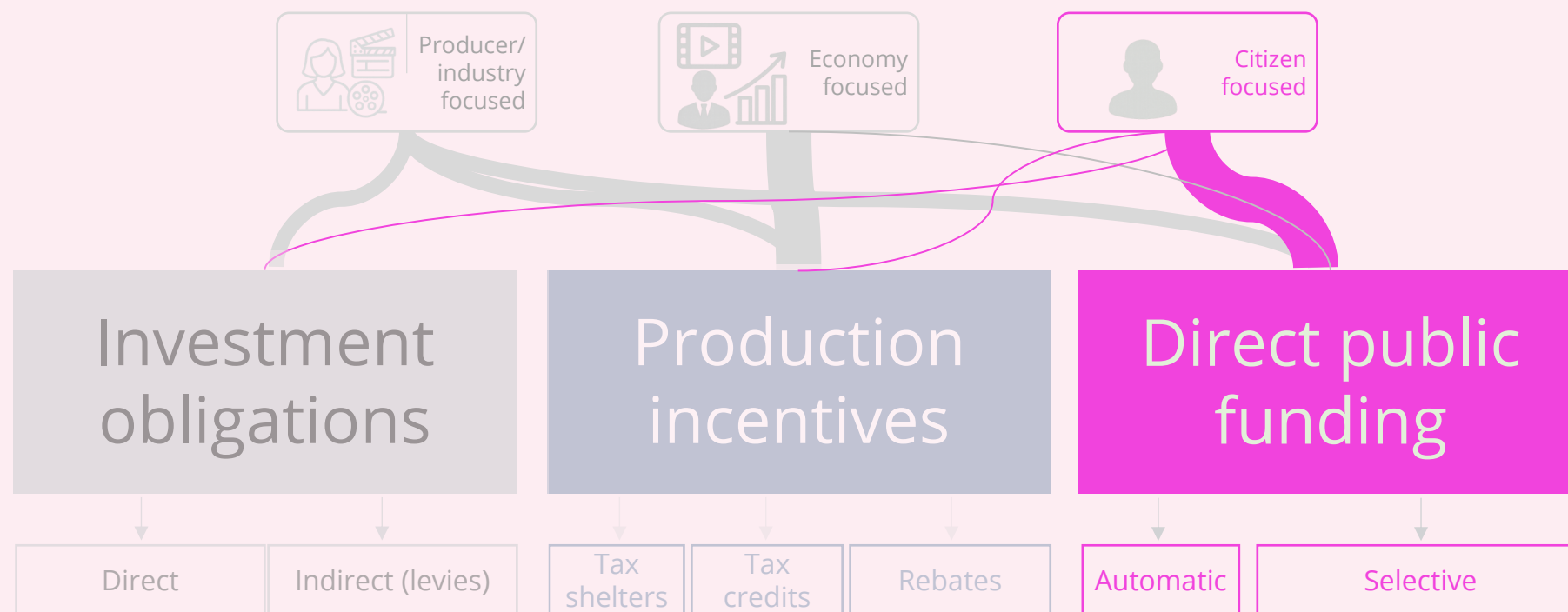
... consequently, tools are used in **different combinations**



... consequently, tools are used in **different combinations**

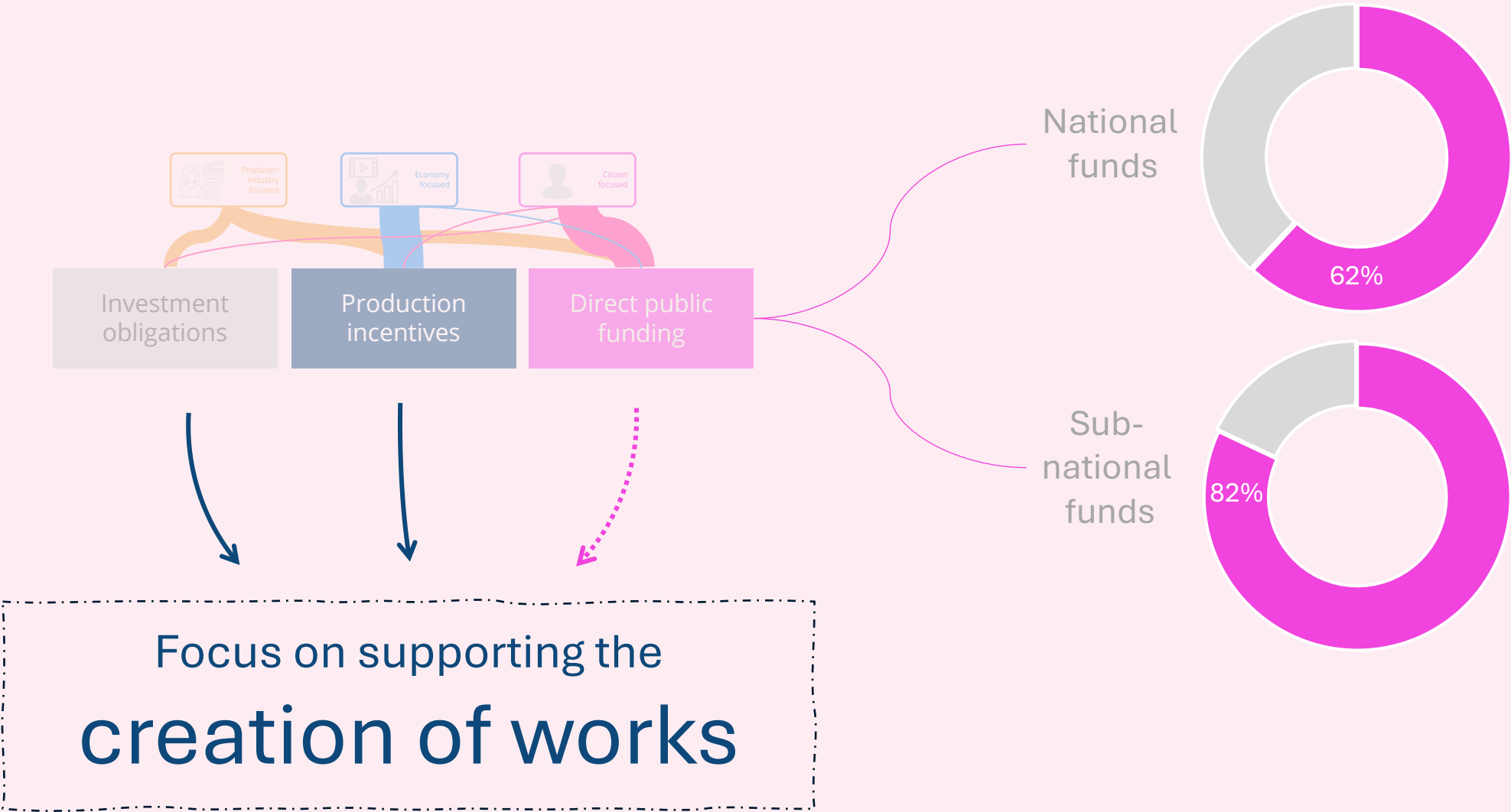


... consequently, tools are used in **different combinations**

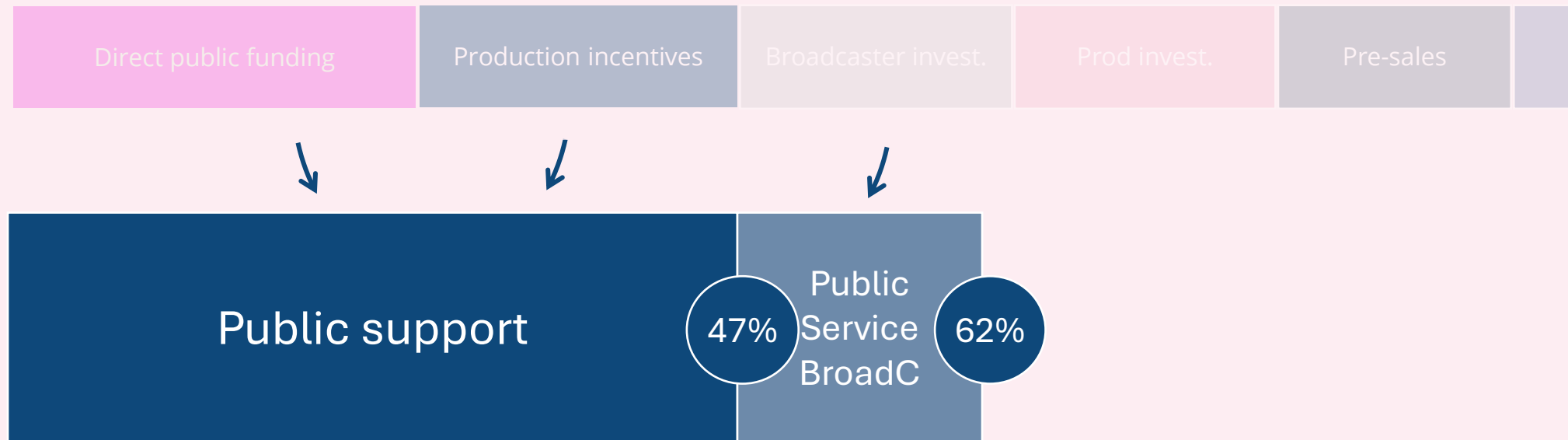




What all approaches
have in common



they are **indispensable**
for financing European films



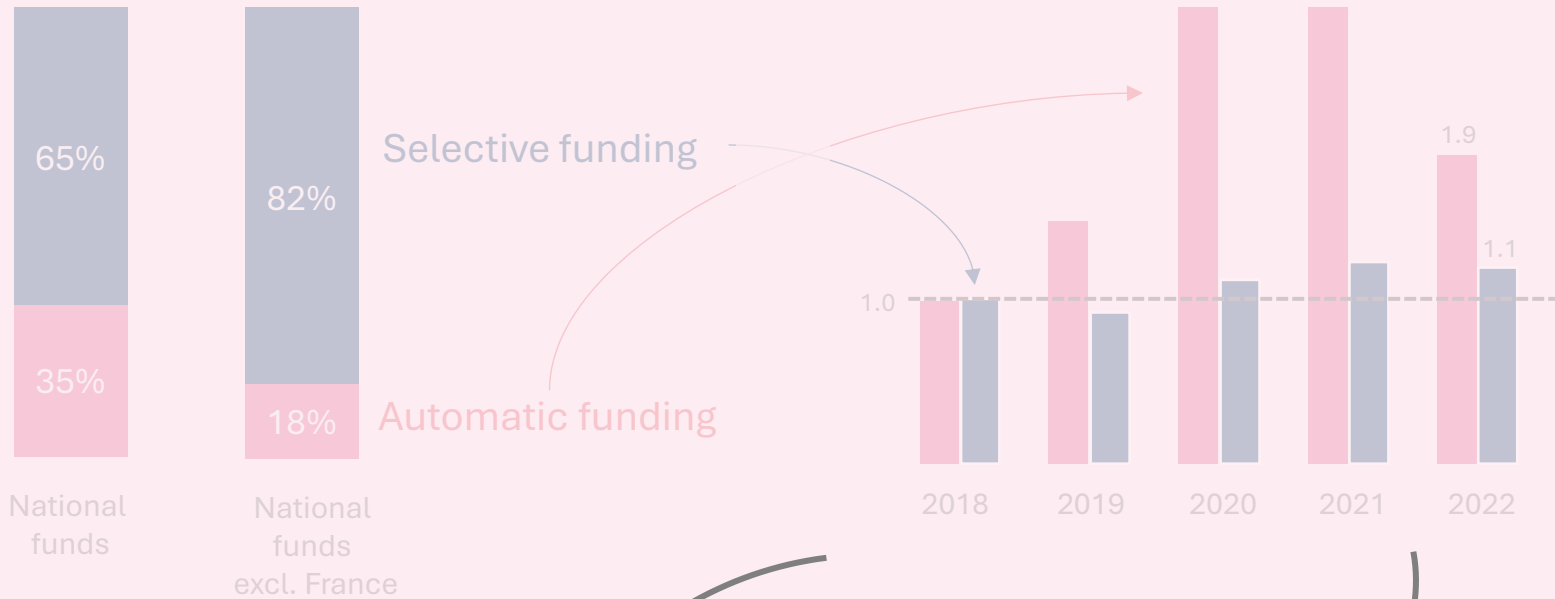
Developments?



Selective funding seems to stagnate

Direct public funding

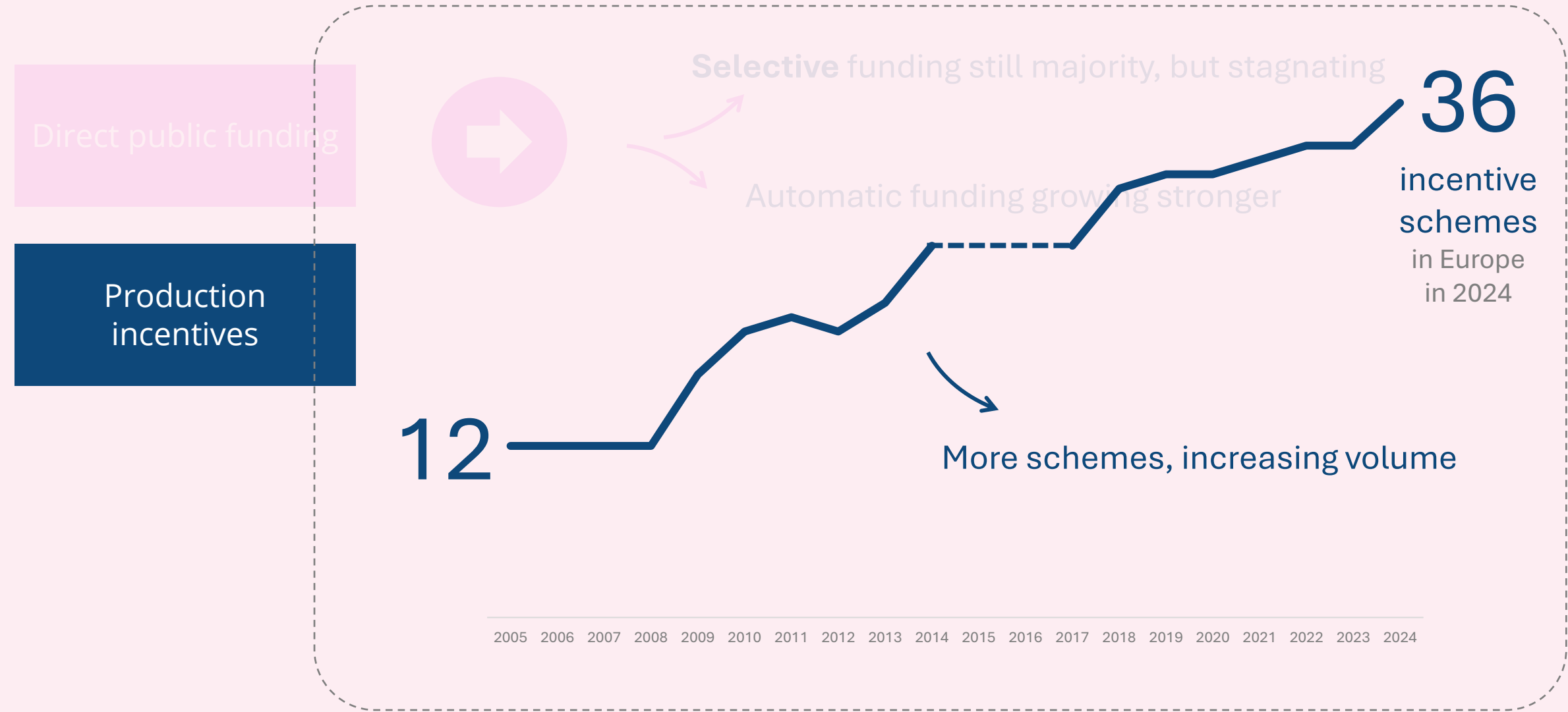
Breakdown and growth of national funds' net activity spend^{est} -2018-2022



Automatic funding growing stronger

Selective funding still majority, but stagnating

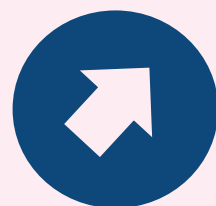
Increasing importance of production incentives



..indicating a **shift towards economic policy** goals?

Direct public funding

Production incentives



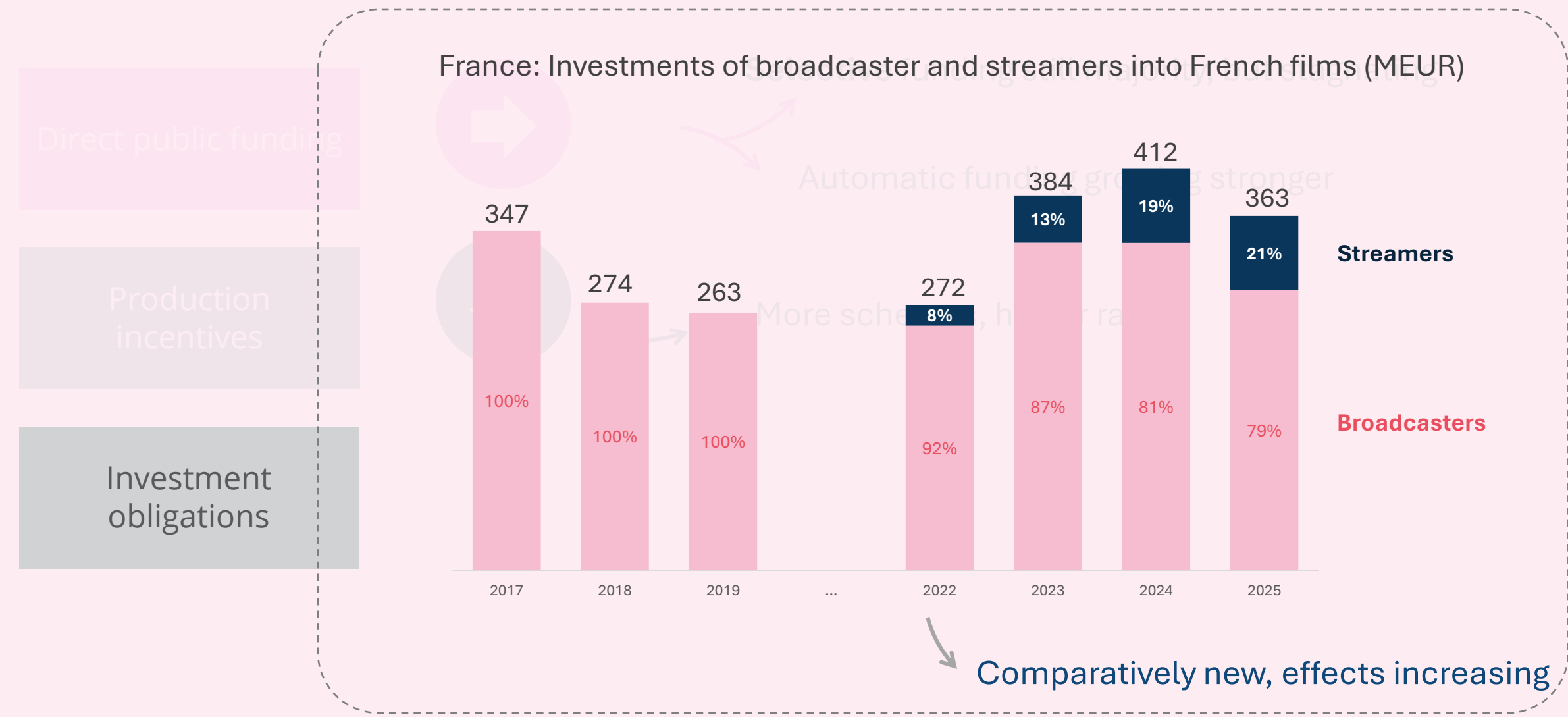
Selective funding still majority, but stagnating

Automatic funding growing stronger

More schemes, increasing volume

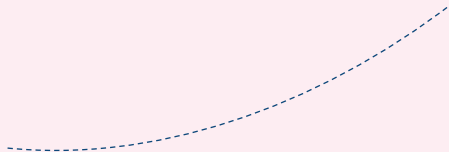
Economic goals

Streamer investment obligations starting to show effect

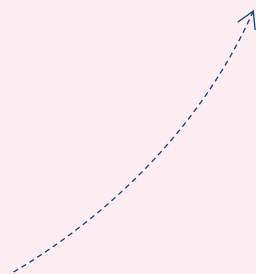




... also reflected in
the financing structure
of European films

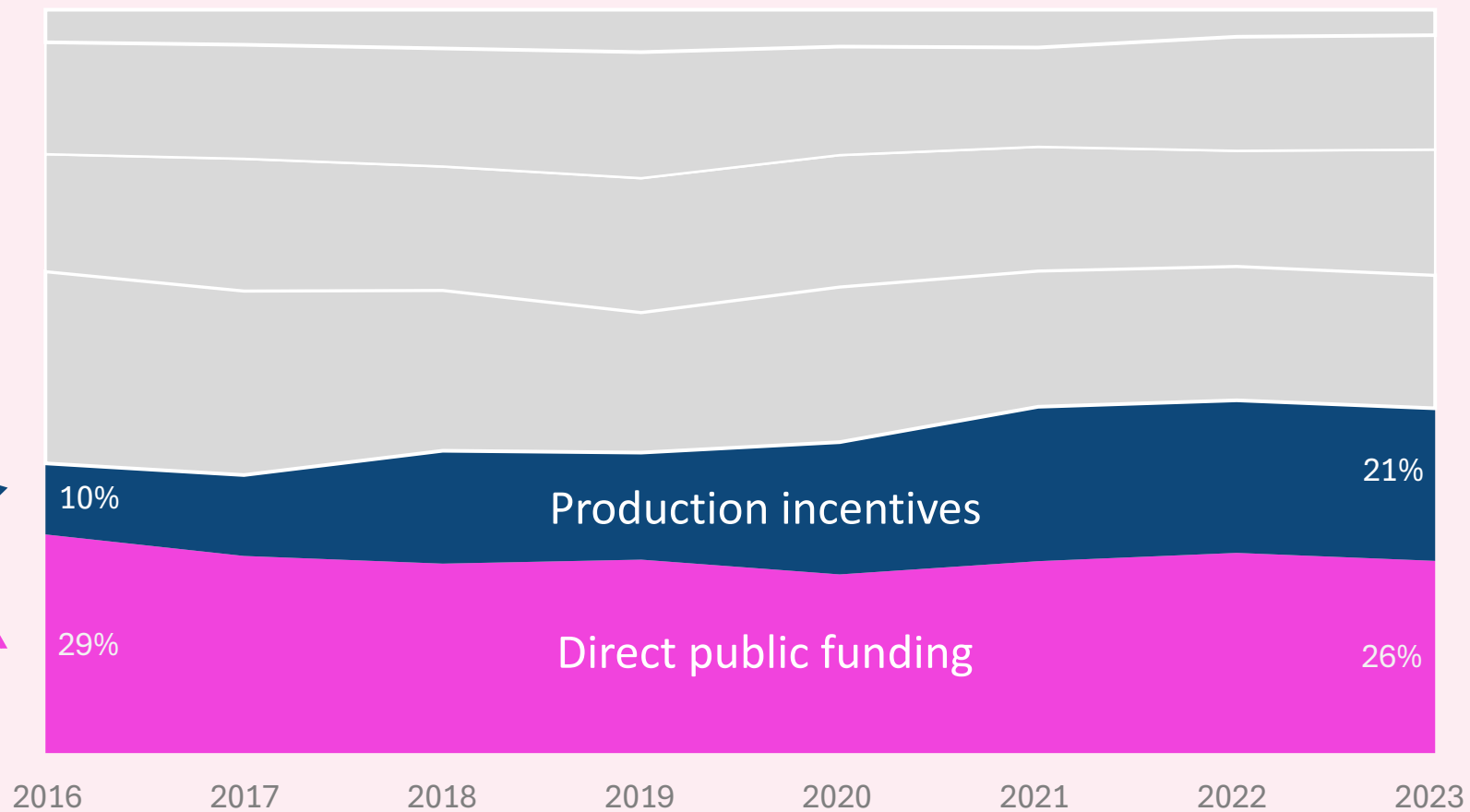


In particular, the increasing share of incentives

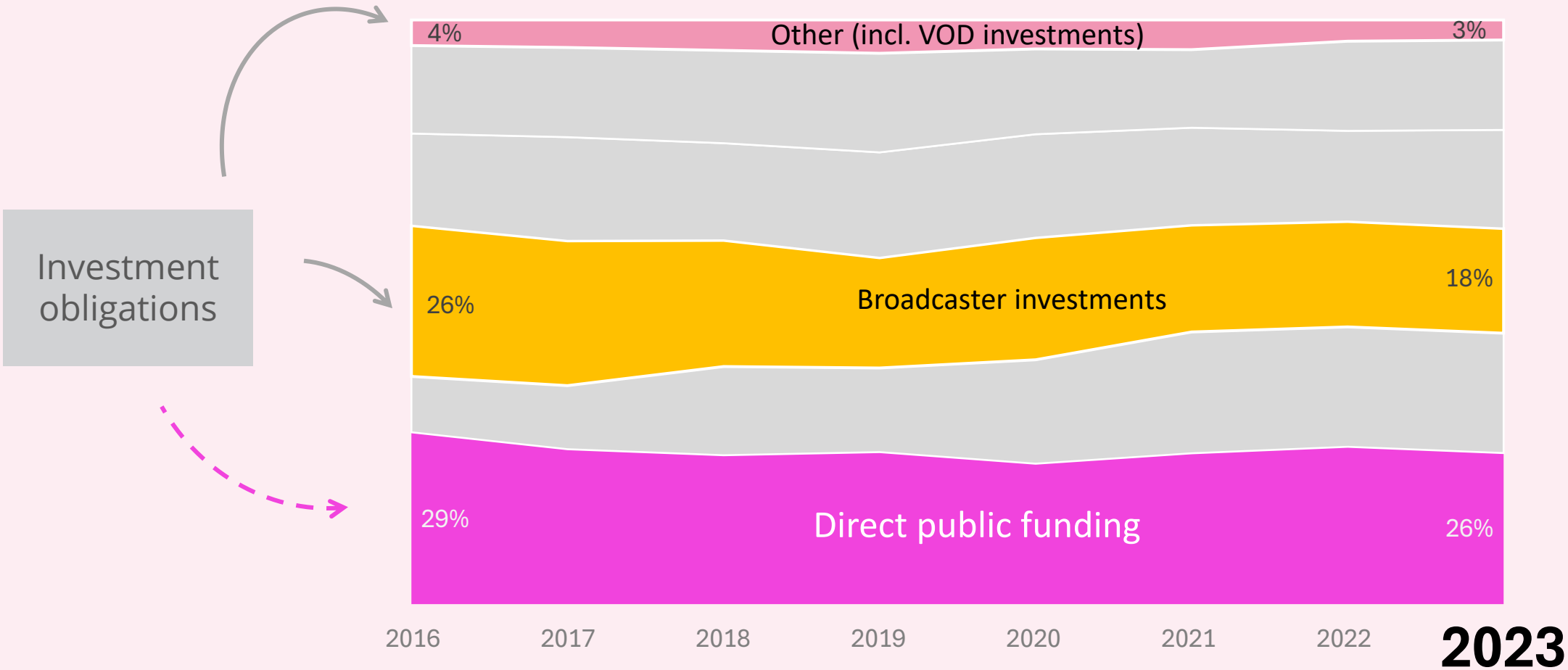


Production incentives

Direct public funding



... except for the effect of investment obligations

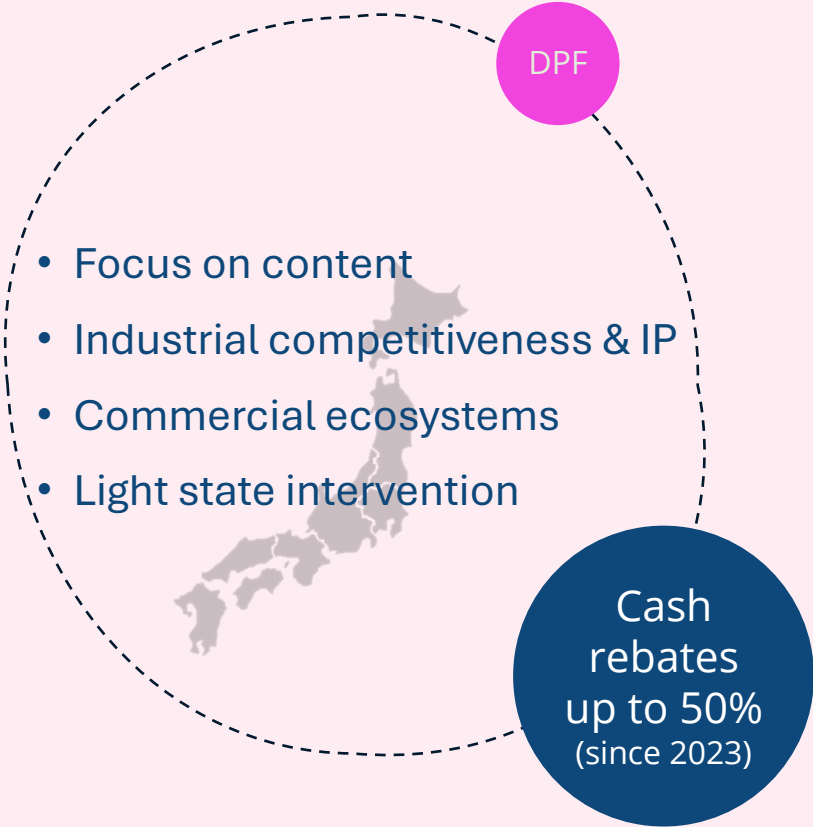
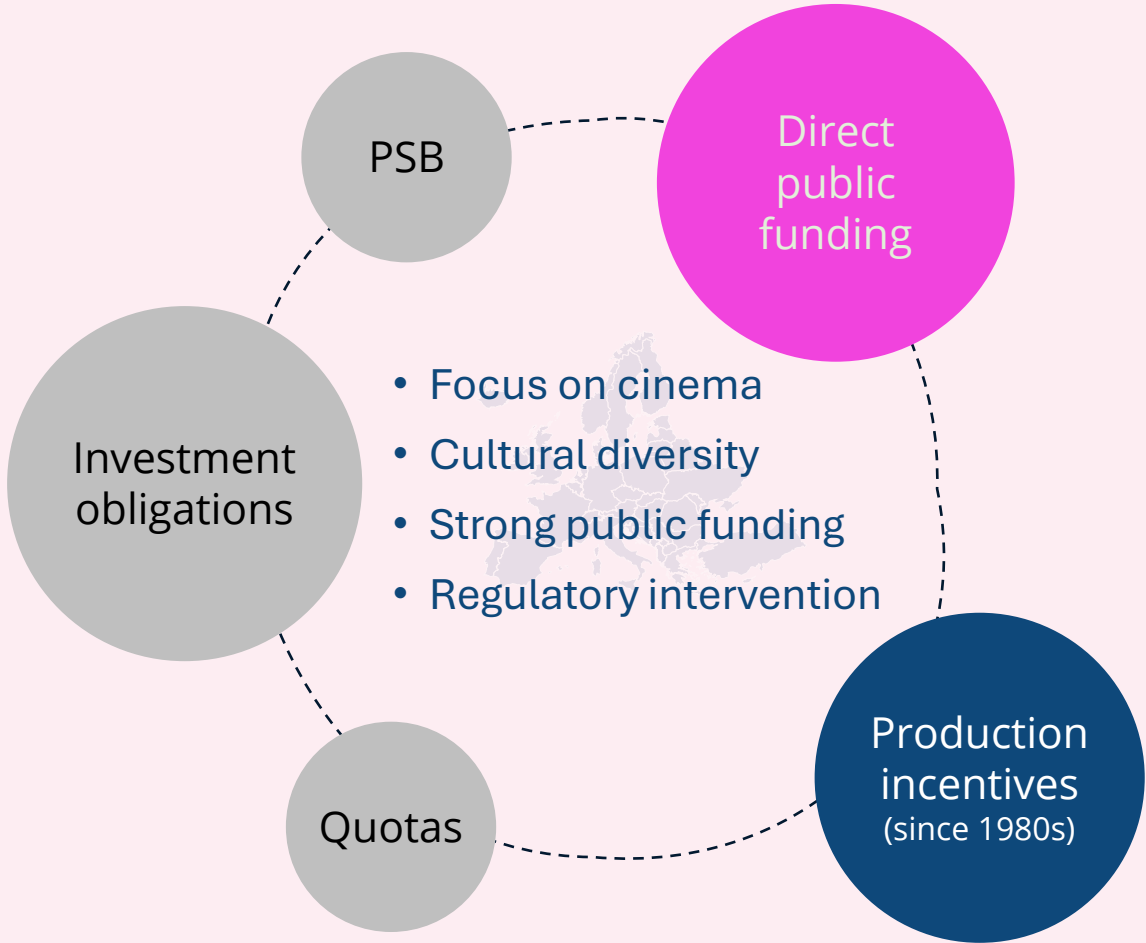




Europe vs. Japan?



Historically **significant differences** in film policy approaches **b/w Europe and Japan**



FOCUS 2026

WORLD FILM MARKET TRENDS

Pick up a free copy!

