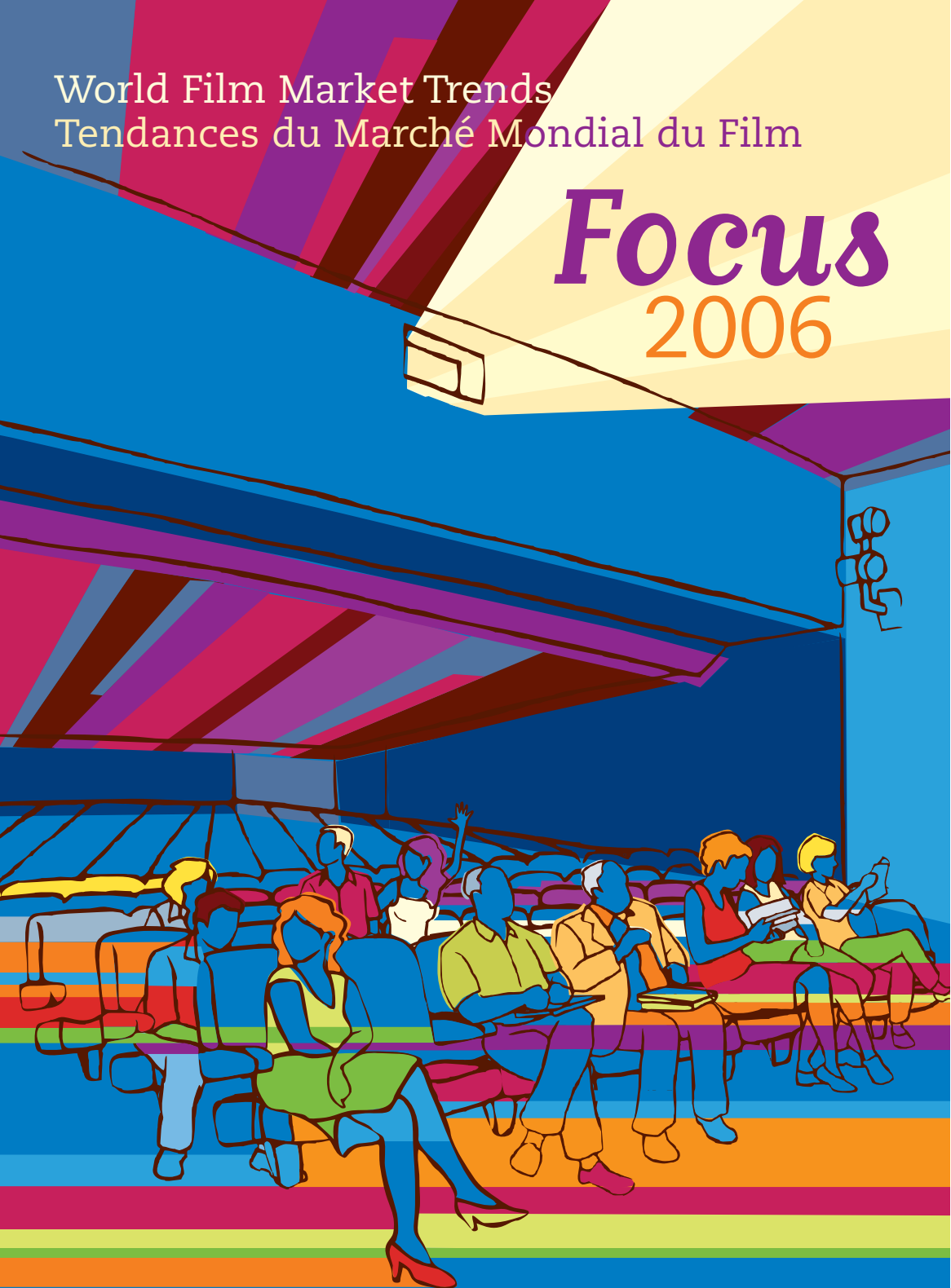


World Film Market Trends  
Tendances du Marché Mondial du Film

# Focus 2006



Marché du Film



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# focus 2006

World Film Market Trends

Tendances du marché mondial du film



OBSERVATOIRE EUROPÉEN DE L'AUDIOVISUEL  
EUROPEAN AUDIOVISUAL OBSERVATORY  
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Marché du Film

## Editorial

Although the term "globalization" is carefully avoided by the film community, it nevertheless seems to be the most adapted to describe the evolution that the industry has experienced over the past years, an evolution that the Marché du Film is revealing with the phenomenal increase in the Asian and Ibero-American attendance.

This ninth edition of FOCUS sheds essential light on the great movements the film industry is experiencing with the broadening of horizons, the competition of new and huge markets and the stakes involved with digital and piracy issues.

This remarkable work of the European Audiovisual Observatory has been enriched this year with complementary data and a new page setting in order to improve further clarity of reading.

**Jérôme Paillard**  
Executive Director

*FOCUS 2006 World Film Market Trends*, appears for the ninth consecutive year. We are pleased to collaborate once again with the Cannes Market and value highly our work together.

**Wolfgang CLOSS**  
Executive Director  
European Audiovisual Observatory

*The European Audiovisual Observatory was set up in December 1992. It is a public-service body whose mission is to gather and distribute information on the audiovisual industry (film, television, video and multimedia) in Europe. 36 European states are members, along with the European Community represented by the European Commission. The Observatory operates within the framework of an extended partial Agreement of the Council of Europe. It carries out its mission with the help of a network of partners, correspondents and professional organisations. The Observatory provides information on markets, financing and legal aspects of the audiovisual sector.*

➡ Internet site (<http://www.obs.coe.int>)

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**Analyst, Department for Information on Markets and Financing at the European Audiovisual Observatory**

Bien que le terme « mondialisation » soit soigneusement évité par la communauté cinématographique, il paraît le mieux adapté pour décrire l'évolution que notre secteur connaît depuis quelques années et dont le Marché du Film donne la mesure par la progression phénoménale de la présence asiatique ou ibéro-américaine.

Cette neuvième édition de FOCUS apporte un éclairage plus que jamais indispensable pour sentir les grands mouvements que connaît l'industrie du cinéma, à l'heure de l'ouverture et de la concurrence de nouveaux et immenses marchés et face aux enjeux du numérique et de la piraterie.

Le travail remarquable de l'Observatoire européen de l'audiovisuel s'est enrichi cette année de données complémentaires et d'une nouvelle mise en page afin d'en améliorer encore la lisibilité.

**Jérôme Paillard**  
Directeur Délégué

*FOCUS 2006, Tendances du marché mondial du film*, paraît pour la neuvième année consécutive. Nous nous réjouissons de cette nouvelle collaboration avec le Marché du Film, à laquelle nous portons toute l'estime qu'elle mérite.

**Wolfgang CLOSS**  
Directeur exécutif  
Observatoire européen de l'audiovisuel

*Créé en décembre 1992, l'Observatoire européen de l'audiovisuel est un organisme de service public consacré à la collecte et à la diffusion de l'information sur l'industrie audiovisuelle (cinéma, télévision, vidéo et multimédia) en Europe. 36 États européens en sont membres ainsi que la Communauté européenne représentée par la Commission européenne. L'Observatoire fonctionne dans le cadre d'un Accord partiel élargi du Conseil de l'Europe et remplit sa mission avec un réseau de partenaires, de correspondants et d'organismes professionnels. L'Observatoire fournit des services d'informations sur les marchés, les financements et le cadre juridique du secteur audiovisuel.*

➡ Site Internet (<http://www.obs.coe.int>)

# focus 2006

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### A species in greater danger than the Emperor penguin?

*Is the cinema-goer becoming an endangered species, more so than the Emperor penguin? Shrinking audiences in cinema theatres constituted a global phenomenon in 2005 – in the United States figures were down 8.7% compared with 2004, and the corresponding figures elsewhere were -11.4% in the European Union, -21.7% in Brazil, -10.2% in Australia, and -5.7% in Japan. On the other hand, audiences grew in South Korea (+5.8%), Russia and, very probably, China. Such a drop in numbers on most of the world's major markets is naturally worrying, and not easy to analyse.*

#### Less effective blockbusters

Taking North America and Europe as a whole, 247 million fewer tickets were sold in 2005 than in 2004. One explanation may lie in the weaker role played by blockbusters in bringing in the crowds. On this North American and European market, the number of films seen by more than 50 million people was 7 in 2001, 8 in 2002, and a steady 6 for the years 2003-2005. The top six films were seen by 445.2 million people in 2003, compared with 477 million in 2004 and 403.3 million in 2005. Whereas the leading film *Shrek 2* achieved a box office of 113.4 million tickets in 2004, *Star Wars: Episode III - Revenge of the Sith*, which topped the list in 2005, only brought in 92 million. That figure was nevertheless better than the 85 million viewers for *Attack of the Clones*. Similarly, the fourth *Harry Potter* was seen by nearly 4 million more people than the third film. The audience for fantasy and science fiction films seems to be holding up, but the atypical public who saw *The Passion of the Christ* probably did not come back to the cinema in 2005, while young children certainly spread their viewing over a greater number of films.

#### Weakening of Hollywood's mid-range movies

Again in relation to the market constituted by North America and Europe together, there is a visible trend towards a drop in the number of films selling between 25 and 50 million tickets in cinemas; there were 16 of them in 2002, 13 in 2003, 12 in 2004, and 11 in 2005. The trend is even clearer for the third category, i.e. films selling between 20 and 25 million tickets in cinemas: there were 12 in 2003,

11 in 2004, and just 4 in 2005. It would be worth analysing the characteristics of the genre and the sociology of this third category in detail, as this is probably where the true explanation for the serious drop in numbers in 2005 lies. In 2005 there were not enough films on a par with *Fahrenheit 9/11* or *50 First Dates*, both of which attracted specific segments of the public into cinema theatres.

#### No runaway successes among national films in Europe

Almost everywhere in Europe, national films achieved better market shares on their own territory than in 2004. However, this is more a reflection of the relative weakness of the offering from Hollywood than an effusion of strong national offerings. In France, the top-ranking national film, *Brice de Nice*, sold just 4.3 million tickets, little more than half the figure of 8.3 million achieved in 2004 by *Les Choristes*. In Germany, *Die weiße Massai* sold 2.2 million tickets in cinemas, compared with 9.1 million in 2004 for *(T)Raumschiff Surprise - Periode 1*. In Italy, Benigni's latest film, *La tigre e la neve*, sold 2.5 million tickets in cinemas, less than the 2.7 million for *Il paradiso all'improvviso* in 2004. Similarly in Spain 3.5 million tickets were sold for *Torrente 3, El protector*, less than the 4 million for *Mar Adentro* in 2004. In the United Kingdom, the UK Film Council explains a drop in cinema attendance less significant than elsewhere (-3.8%) by the strong performance of British films, which accounted for a 33% market share; this figure includes, however, a number of "inward investment" films whose fundamental British-ness has been questioned by the trade press.

## Paradoxical international successes

National successes are not necessarily the films that are most successful on other European markets and on international markets, and this was particularly true in 2005. *Brice de Nice*, *Die weiße Massai*, *La tigre e la neve* and *Torrente 3, El protector* were not widely distributed outside their respective countries of origin. The success of European films in other European countries is probably less than in previous years – only 10 films achieved box offices of more than one million tickets in the European Union outside their national market, compared with 12 in 2004 and 12 in 2003.

Among the European films that came out in 2005, the one that was most successful in Europe outside its national market was Woody Allen's *Match Point*, which sold 2.7 million tickets in Europe in 2005 even before its release in the United Kingdom and the United States. Although this was the most successful film in Europe, it fell below the 7.6 million tickets sold in 2004 in Europe (excluding the United Kingdom) by *Bridget Jones: The Edge of Reason*. The pleasant surprise of a Woody Allen film produced by the BBC was supplemented by the remarkable successes achieved by three French films (*La marche de l'empereur*, *Transporter 2* and *Danny the Dog*) in North America, where they were two to three times more successful than in Europe.

## Concern

It is always difficult to interpret a significant decline in cinema attendance. Is it merely a gap caused by a weak offer, or is it in fact the start of a crisis caused by a significant evolution in consumer habits? In the United States, 2005 saw falling numbers for the third year running. The figures available for the first few months of 2006 would seem to indicate that this trend is continuing, except in France, where a number of successful national films has produced an upswing. What is more, the DVD market also showed signs of slowing down for the first time in 2005.

At the same time, video-on-demand (VoD) services have multiplied and everything indicates

that the unauthorised exchange of files via the Internet is continuing to increase. The finger is of course pointed at piracy here. It is common sense to argue that consumption free of charge is damaging to consumption for which a charge is made. Common sense does not always constitute proof, however. The fact that the drop in cinema attendance has been less substantial in countries where broadband networks are the most developed (not to mention the increase in attendance in South Korea, a leading country in terms of networks) should discourage anyone jumping to conclusions. As for the growth of VoD, the operators need to make more of an effort at transparency for an accurate appreciation to be possible.

We know that penguins' ability to survive is linked to the instinct that causes them to huddle together at regular intervals... as well as to their willingness to walk when necessary to join the group. Some years are colder than others, and the renewal of the population is more uncertain, but the species lives on. Will cinema-goers, a more puzzling and unpredictable species, demonstrate the same will to survive?

**André Lange**

Head of the Department for Information on Markets and Financing  
European Audiovisual Observatory



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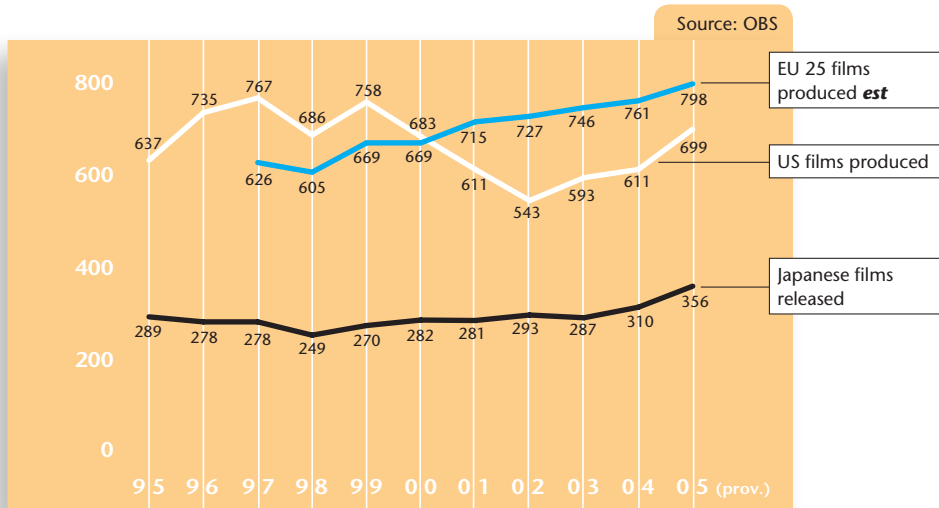
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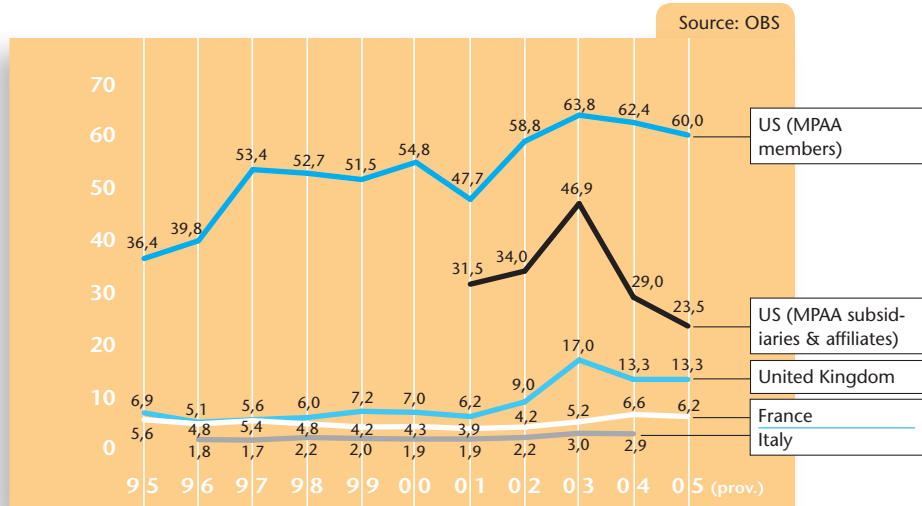
## Number of feature films produced in the European Union, the United States and Japan | 1995-2005



Note: this graphic has been revised to show the US data series 'films produced' rather than the 'films released' series as previously. This follows confirmation from the MPAA that the 'films produced' series includes only feature films intended for theatrical release.

## Average cost of production of feature films | 1995-2005

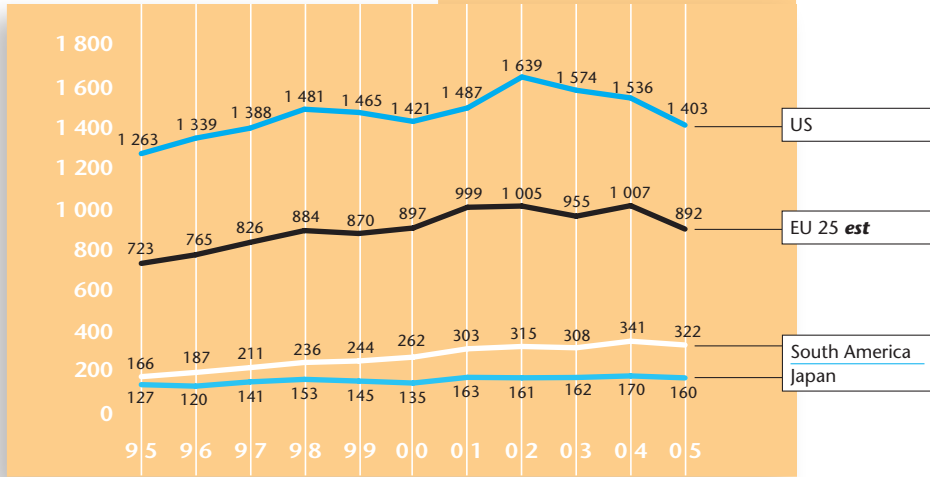
USD million.



## Admissions | 1995-2005

In millions.

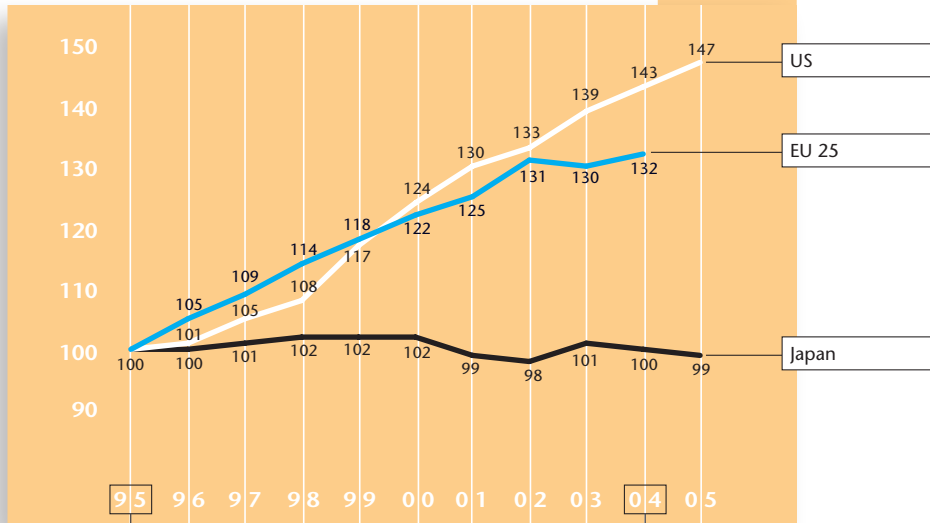
Sources: MPA/OBS/Informa Media/Eiren



## Evolution of average ticket prices | 1995-2005

Base 100 in 1995, calculated in national currency.

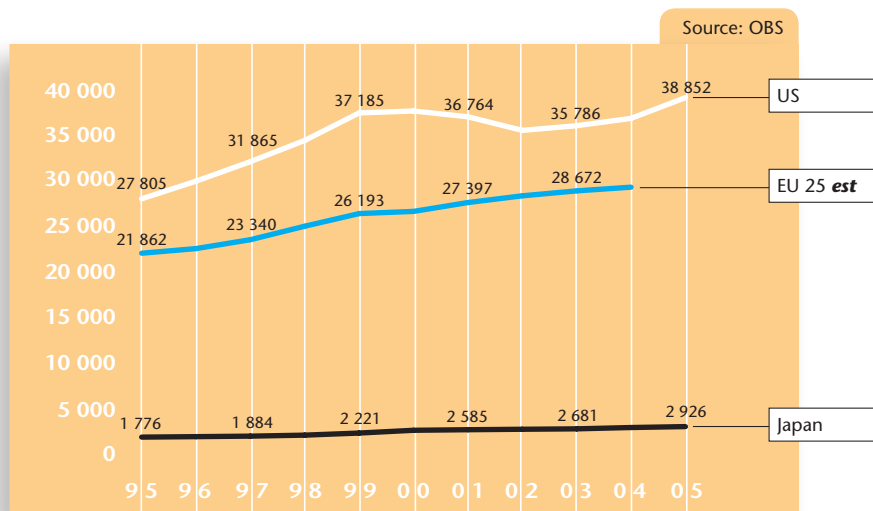
Source: OBS



EU 25:	5,63 USD
US:	4,35 USD
JP:	13,21 USD

EU 25:	7,05 USD
US:	6,21 USD
JP:	11,46 USD

## Number of screens | 1995-2005



Note: EU 25 data revised.

## World box office top 20 | 2005

USD million.

	Original title	Country of origin	North American box office	International box office	Total
1	Star Wars III: Revenge of the Sith	US	380	468	848
2	Harry Potter and the Goblet of Fire (1)	GB inc/US	277	531	808
3	War of the Worlds	US	234	357	591
4	Madagascar	US	193	340	533
5	Charlie and the Chocolate Factory	GB inc/US	206	266	472
6	Mr. & Mrs. Smith (1)	US	186	282	468
7	The Chronicles of Narnia (1)	US/NZ inc	226	202	428
8	King Kong (1)	US/NZ inc	175	213	388
9	Batman Begins	US/GB inc	205	166	371
10	Hitch	US	178	189	367
11	Meet the Fockers (2)	US	117	230	347
12	Fantastic Four	US/DE	155	175	330
13	Wedding Crashers	US	209	76	285
14	Robots	US	128	133	261
15	Constantine	US	76	154	230
16	Million Dollar Baby (2)	US	99	121	220
17	Chicken Little (1)	US	132	84	216
18	Kingdom of Heaven	GB inc/DE/ES/US	47	163	210
19	The Pacifier	US/CA inc	113	85	198
20	Flightplan (1)	US	89	105	194

(1) Still on release in 2006.

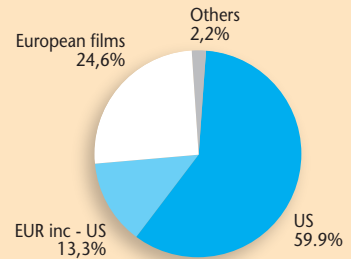
(2) 2004 release, box office 2005 only.

Source: Variety

# European Union

Population 2004	457,2 million
GDP 2005	13 442 billion USD
1 USD	0,82 EUR (April 2006)
Admissions 2005 <b>est</b>	892 million
Average admissions/inhabitant 2005 <b>est</b>	1,95
Average ticket price 2004	5,68 EUR (= 7,05 USD)
Screens 2004 <b>est</b>	29 077
Screens in multiplexes (01/01/2005)	10 183

**Market shares 2005 est**



## European Union production volume progresses steadily

On the basis of available data, the European Audiovisual Observatory estimates that a total of 798 films were produced in the 25 Member States of the European Union in 2005, an increase of 37 films in relation to 2004 (761 films). Most European Union countries registered either stable or increasing production volume with record levels attained in Denmark, Germany, France and Spain. Italy was the only major market to register a decline, with a loss of an estimated 52 films between 2004 and 2005. Among the smaller markets Finland showed a small drop, whilst first estimates for Belgium would also appear to show a small reduction in overall volume.

## Admissions dip under the 1 billion milestone once more

Admissions in the European Union fell back under the 1 billion milestone in 2005, with a total of 892 million admissions registered in the 25 member countries. This represents a decline of 11.4% in relation to the high point of 2004 (1 007 million admissions) and is the lowest level of attendance since 1999.

Germany (-18.8%), Spain (-12.5%) and France (-10.1%) all reported double-digit drops, while excellent results for the months of July and November in Italy and a strong final quarter in the United Kingdom allowed these markets to resist somewhat better, with declines of -7.5% and -3.8% respectively.

Among the mid-sized and smaller markets Cyprus, the Czech Republic, Estonia, Finland, Ireland, Lithuania, the Netherlands, Slovakia and Sweden all reported drops in attendance for the second consecutive year. The steepest drops among the mid-sized markets were registered in Austria (-18.9%) and the Czech Republic (-21.3%) and Polish admissions fell by 29.4% in relation to the exceptional total registered in 2004. Least affected among the smaller markets were Denmark, Estonia and Latvia, all down by 4.7%, with attendance in Ireland also falling back by a relatively limited 5%.

In response to the increasing difficulty in identifying a plausible country of origin for international productions, the European Audiovisual Observatory has, after consultation, decided to adopt a new approach in this year's FOCUS. Films understood to have been produced in Europe (or elsewhere) with incoming US investment have been identified here by the mention 'inc' next to the 'host' country in the country of origin details.

On this basis, provisional estimates for market shares in the European Union in 2005 show that European films achieved a market share of 24.6%. Films produced in Europe and benefiting from incoming US investment obtained a market share of 13.3%: examples of films in this category are *Harry Potter and the Goblet of Fire*, *Charlie and the Chocolate Factory* and *Un long dimanche de fiançailles*. On a comparable basis the corresponding market share figures for 2004 were 25.2% of admissions for European films and 5.9% for films produced in Europe with US investment.

Source: OBS

## Number of feature films produced in the European Union | 2000-2005

In units.

Country		prov.						Sources
		2000	2001	2002	2003	2004	2005	
<b>Austria</b>	Total	17	12	26	20	24	24	OGFMK/FAF
<b>Belgium (1)</b>	100% national	10	4	6	5	8	10	MFB/OBS
	maj. co-prod.	12	6	9	9	12	11	MFB/OBS
	min. co-prod.	6	13	12	18	26	19	MFB/OBS
<b>Cyprus</b>	100 % national	0	0	0	0	0	~	PIO/Min.Ed & Cult.
	maj. co-prod.	1	4	2	1	~	2	PIO/Min.Ed & Cult.
	min. co-prod.	0	0	0	1	1	1	PIO/Min.Ed & Cult.
<b>Czech Rep.</b>	100 % national	11	12	18	10	19	21	Min.Cult./OBS
	maj. co-prod.	4	5	1	4	1	1	Min.Cult./OBS
	min. co-prod.	1	1	0	3	1	1	Min.Cult./OBS
<b>Denmark</b>	Total	25	27	32	38	33	~	DFI
	100 % national fiction	10	7	11	12	12	16	DFI
	maj. co-prod. (fiction)	7	12	8	12	7	15	DFI
	min. co-prod. (fiction)	4	3	4	5	8	~	DFI
	Feature documentaries	4	5	9	9	6	10	DFI
<b>Estonia</b>	100 % national	0	2	1	1	2	5	EFSA
	maj. co-prod.	0	1	1	1	1	1	EFSA
<b>Finland (1)</b>	Total (fiction)	9	12	10	11	13	11	FFF
	Feature documentaries	2	4	2	3	5	4	FFF
<b>France</b>	Total	171	204	200	212	203	240	CNC
	100% national	111	126	106	105	130	126	CNC
	maj. co-prod.	34	46	57	78	37	61	CNC
	min. co-prod.	26	32	37	29	36	53	CNC
<b>Germany</b>	Total	94	107	117	107	121	146	SPIO
	100 % national fiction	47	57	39	54	60	60	SPIO
	Co-prod. (fiction)	28	26	45	26	27	43	SPIO
	Feature documentaries	19	24	33	27	34	43	SPIO
<b>Greece</b>	Total	18	23	19	24	18	~	GFC/OBS
	100% national	14	15	15	21	12	10	GFC/OBS
	maj. co-prod.	2	3	3	2	4	2	GFC/OBS
<b>Hungary</b>	Total	21	22	24	21	26	26	Min.Cult./AHFD/NFO
	100 % national	17	20	19	19	19	17	Min.Cult./AHFD/NFO
	maj. co-prod.	4	2	5	1	4	1	Min.Cult./AHFD/NFO
<b>Ireland</b>	Total	10	8	2	10	13	12	IFB/OBS
<b>Italy (1)</b>	Total	103	103	130	117	138	86	OIA
	100 % national	87	71	97	97	97	59	OIA
	Co-productions	16	32	33	20	41	27	OIA
	maj. co-prod.	7	21	16	13	18	15	OIA
	min. co-prod.	9	11	17	7	23	12	OIA
<b>Latvia</b>	Total	2	3	1	7	3	2	NFCLV
	100% national	2	2	0	7	2	0	NFCLV
	maj. co-prod.	0	0	1	0	1	2	NFCLV
<b>Lithuania</b>	Total	2	0	1	2	1	2	Min. Cult./LK
	100% national	0	0	0	1	1	1	Min. Cult./LK
	maj. co-prod.	1	0	0	0	0	1	Min. Cult./LK

Continued overleaf

Continued

## Number of feature films produced in the European Union | 2000-2005

In units.

Country		2000	2001	2002	2003	prov.		Sources
						2004	2005	
<b>Luxembourg</b>	Total	8	10	10	12	13	10	CNA/LFF/OBS
	100%national	0	0	1	0	2	1	CNA/LFF/OBS
	maj. co-prod.	~	~	~	1	1	2	CNA/LFF/OBS
	min. co-prod.	8	~	9	11	10	7	CNA/LFF/OBS
<b>Malta</b>	Total	0	0	0	1	1	1	MFC/OBS
<b>The Netherlands</b>	Total	34	28	29	33	28	33	NFC/NVF/NVB
(1)	100 % national	27	23	18	21	21	27	NFC/NVF/NVB/OBS
	maj. co-prod.	3	1	4	3	6	6	NFC/NVF/NVB/OBS
<b>Poland</b>	Total	22	29	30	20	20	23	Min. Cult.
	100 % national	19	27	27	18	17	19	Min. Cult.
	maj. co-prod.	0	1	0	1	0	2	Min. Cult.
	min. co-prod.	3	1	3	1	3	2	Min. Cult.
<b>Portugal</b>	Total	13	17	13	17	16	~	ICAM
	100 % national	4	4	2	6	7	12	ICAM
	maj. co-prod.	6	10	8	10	5	~	ICAM
<b>Slovakia</b>	Total	3	4	6	8	3	4	SKFI
	100 % national	0	2	0	1	2	2	SKFI
	Co-productions	3	2	6	7	1	4	SKFI
	maj. co-prod.	~	~	~	3	0	1	SKFI
	min. co-prod.	~	~	~	4	1	3	SKFI
<b>Slovenia</b>	Total	5	9	10	7	5	10	SFF
	100 % national	5	8	9	2	4	7	SFF
	Co-productions	0	1	1	5	1	3	SFF
	maj. co-prod.	~	~	~	4	0	1	SFF
	min. co-prod.	~	~	~	1	1	2	SFF
<b>Spain</b>	Total	98	107	137	110	133	142	ICAA
	100 % national	64	67	80	68	92	89	ICAA
	maj. co-prod.	13	19	22	16	17	29	ICAA
	min. co-prod.	21	21	35	26	24	24	ICAA
<b>Sweden</b>	Total	44	28	28	36	42	~	SFI
	100 % national	20	16	12	14	22	31	SFI
	maj. co-prod.	18	9	9	13	14	8	SFI
	min. co-prod.	6	3	7	9	6	~	SFI
<b>United Kingdom</b>	Total	90	83	84	88	75	78	SF
	100 % national	51	52	41	40	28	42	SF
	maj. co-prod.	13	12	19	18	19	20	SF
	min. co-prod.	13	15	18	21	17	12	SF
	Incoming US production	11	3	6	5	10	4	SF
	Other incoming production	2	1	0	4	1	0	SF
	100% national	52	51	37	44	27	37	UKFC Int.
	Co-productions	~	~	66	99	86	62	UKFC Int.
	<b>EU 25 (2)</b>	<b>669</b>	<b>715</b>	<b>727</b>	<b>746</b>	<b>761</b>	<b>798</b>	OBS

Data in italics are estimated.

(1) Revised series.

(2) Not including minority co-productions, US and foreign production in the United Kingdom and feature documentaries in Denmark, Finland and Germany.

## Admissions in the European Union | 2000-2005

In millions.

Country							<i>prov.</i>	2005/04
	2000	2001	2002	2003	2004	2005		
<b>Austria</b>	16,30	18,83	19,32	17,71	19,38	15,72	-18,9%	
<b>Belgium</b>	23,55	24,03	24,38	22,71	24,12	21,70	-10,0%	
<b>Cyprus</b>	0,93	0,86	0,96	1,00	0,96	0,78	-18,3%	
<b>Czech Republic</b>	8,72	10,36	10,69	12,14	12,05	9,48	-21,3%	
<b>Denmark</b>	10,69	11,97	12,91	12,30	12,79	12,19	-4,7%	
<b>Estonia</b>	1,08	1,30	1,56	1,27	1,19	1,13	-4,7%	
<b>Finland</b>	7,10	6,50	7,70	7,70	6,90	6,00	-13,0%	
<b>France</b>	165,76	187,45	184,41	173,46	195,33	175,65	-10,1%	
<b>Germany</b>	152,53	177,93	163,91	148,96	156,71	127,32	-18,8%	
<b>Greece</b>	13,50	~	15,00	15,00	~	~	-	
<b>Hungary</b>	14,29	15,70	15,28	13,65	13,66	12,12	-11,3%	
<b>Ireland</b>	14,89	15,94	17,32	17,43	17,26	16,40	-5,0%	
<b>Italy</b>	104,24	113,26	115,59	110,45	116,34	107,70	-7,5%	
<b>Latvia</b>	1,46	1,15	1,07	1,13	1,68	1,60	-4,7%	
<b>Lithuania</b>	2,10	1,76	1,39	1,44	1,40	1,22	-13,1%	
<b>Luxembourg</b>	1,36	1,41	1,43	1,26	1,36	1,16	-14,8%	
<b>Malta</b>	0,97	1,04	1,06	1,08	1,03	~	-	
<b>Netherlands</b>	21,60	23,83	24,09	24,86	23,04	20,61	-10,6%	
<b>Poland</b>	18,70	26,20	25,90	23,77	33,40	23,57	-29,4%	
<b>Portugal (1)</b>	17,92	19,47	19,48	18,72	17,14	15,75	-8,1%	
<b>Slovakia</b>	2,64	2,84	3,01	2,97	2,90	2,20	-24,1%	
<b>Slovenia</b>	2,22	2,47	2,78	2,97	3,00	2,44	-18,6%	
<b>Spain</b>	135,39	146,81	140,72	137,47	143,93	126,01	-12,5%	
<b>Sweden</b>	16,98	18,10	18,30	18,17	16,61	14,62	-12,0%	
<b>United Kingdom</b>	142,51	155,91	175,90	167,26	171,25	164,69	-3,8%	
<b>EU 25</b>	<b>897</b>	<b>999</b>	<b>1 005</b>	<b>955</b>	<b>1 007</b>	<b>892</b>	<b>-11%</b>	

Data in italics are estimated or provisional.

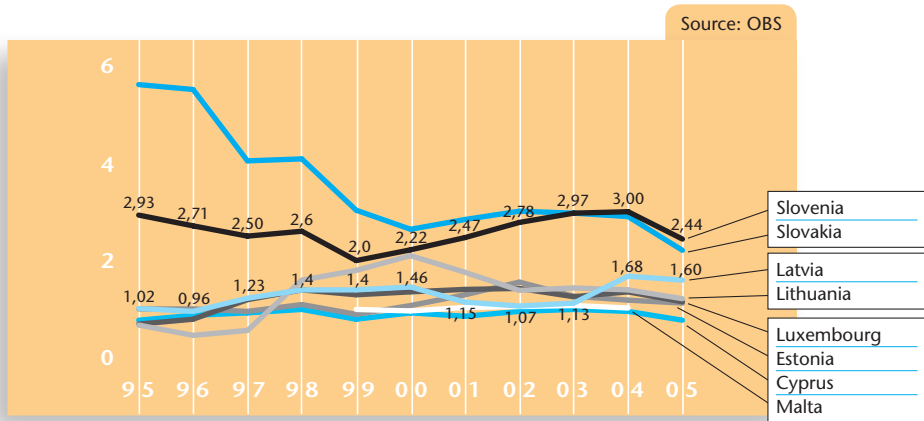
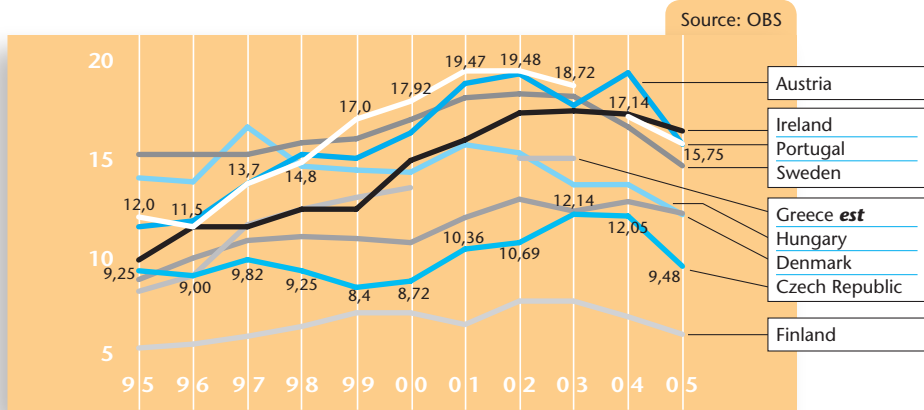
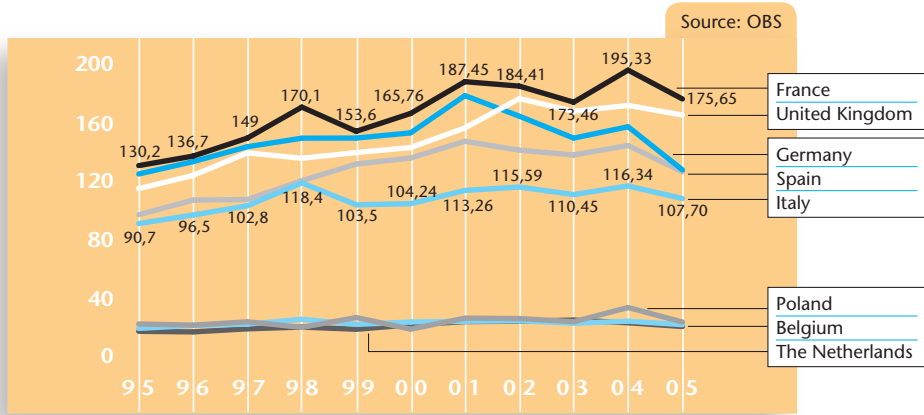
(1) Data from 2004 onwards are not comparable with previous years.

Source: OBS

# European Union

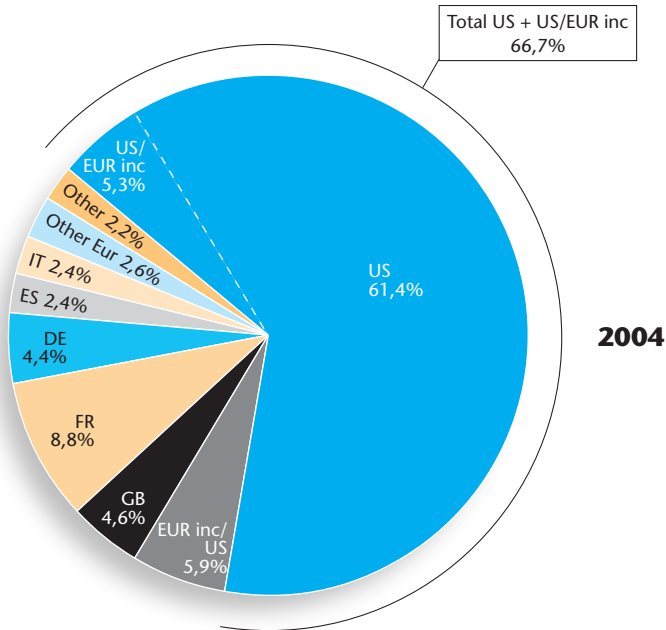
## Admissions in the European Union | 1995-2005

In millions.

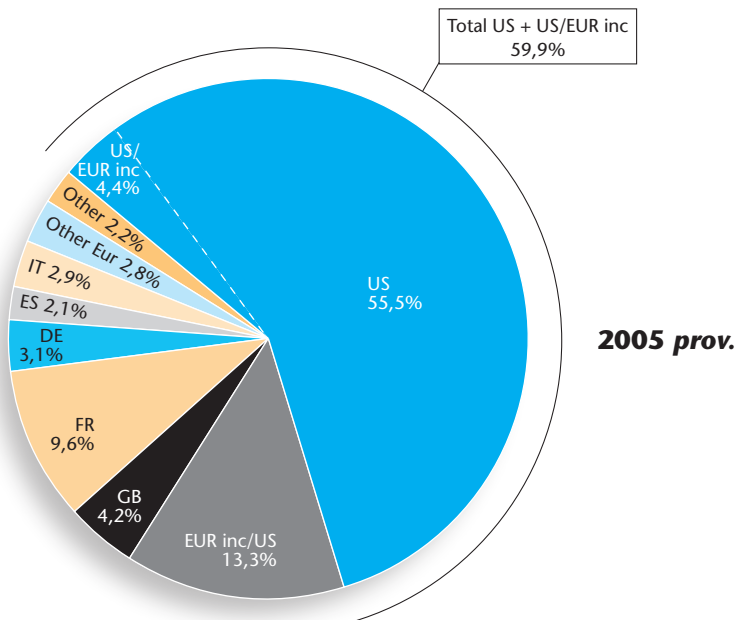




**Breakdown of European Union admissions by the origin of films | 2004-2005**



**2004**



**2005 prov.**

Note: 'inc' refers to films produced in Europe with US inward investment.

Source: OBS/LUMIERE

## European Union

The tables below are based on analysis of around 80% of admissions in 34 European countries for 1996-2004 and of admissions in 24 European countries including Turkey for 2005.

### Top 25 films by admissions in Europe | since 1996

	Original title	Country of origin	Year	Director	Admissions
1	Titanic	US	1997	James Cameron	103 700 910
2	The Lord of the Rings: The Fellowship...	US/NZ inc	2001	Peter Jackson	60 465 107
3	Harry Potter and the Sorcerer's Stone	GB inc/US	2001	Chris Columbus	60 435 580
4	The Lord of the Rings: The Two Towers	US/NZ inc	2002	Peter Jackson	55 550 059
5	The Lord of the Rings: The Return...	US/NZ inc/DE	2003	Peter Jackson	54 786 811
6	Harry Potter and the Chamber...	GB inc/US	2002	Chris Columbus	52 558 758
7	Star Wars I - The Phantom Menace	US	1999	George Lucas	44 845 564
8	Finding Nemo	US	2003	A. Stanton & L. Unkrich	44 843 338
9	Shrek 2	US	2004	Adamson, Asbury & Vemon	44 589 532
10	Independence Day	US	1996	Roland Emmerich	42 597 509
11	Harry Potter and the Goblet of Fire	GB inc/US	2005	Mike Newell	41 083 856
12	Harry Potter and the Prisoner...	GB inc/US	2004	Alfonso Cuarón	40 468 696
13	The Sixth Sense	US	1999	M. Night Shyamalan	37 119 466
14	Men in Black	US	1997	Barry Sonnenfeld	33 601 789
15	Spider-Man	US	2002	Sam Raimi	33 540 267
16	The Matrix Reloaded	US	2003	A. & L. Wachowski	33 355 634
17	Star Wars III - Revenge of the Sith	US	2005	George Lucas	33 063 194
18	Gladiator	US/GB inc	2000	Ridley Scott	32 327 067
19	Tarzan	US	1999	Chris Buck & Kevin Lima	31 715 555
20	Star Wars II - Attack of the Clones	US	2002	George Lucas	31 230 880
21	Pirates of the Caribbean: The Curse...	US	2003	Gore Verbinski	30 412 532
22	Bridget Jones's Diary	GB/US	2001	Sharon Maguire	30 266 964
23	Notting Hill	GB/US	1999	Roger Michell	29 692 385
24	Madagascar	US	2005	E. Darnell & T. McGrath	29 447 055
25	The Lost World: Jurassic Park	US	1997	Steven Spielberg	28 687 868

Source: OBS/LUMIERE

### Top 25 European films by admissions in Europe | since 1996

	Original title	Country of origin	Year	Director	Admissions
1	Bridget Jones's Diary	GB/US	2001	Sharon Maguire	30 266 964
2	Notting Hill	GB/US	1999	Roger Michell	29 692 385
3	Bean	GB/US	1997	Mel Smith	25 809 024
4	The Full Monty	GB/US	1997	Peter Cattaneo	25 454 041
5	Astérix & Obélix : Mission Cléopâtre	FR/DE	2002	Alain Chabat	22 363 663
6	Astérix et Obélix contre César	FR/DE/IT	1999	Claude Zidi	21 734 376
7	Le cinquième élément	FR	1997	Luc Besson	21 680 638
8	Le fabuleux destin d'Amélie Poulain	FR/DE	2001	Jean-Pierre Jeunet	21 152 051
9	La vita è bella	IT	1997	Roberto Benigni	20 345 424
10	Bridget Jones: The Edge of Reason	GB/US/FR/DE/IE	2004	Beeban Kidron	19 365 345
11	Love Actually	GB/US	2003	Richard Curtis	16 201 296
12	The Others	ES/US	2001	Alejandro Amenábar	14 670 028
13	Johnny English	GB/US	2003	Peter Howitt	14 525 158
14	Der Schuh des Manitu	DE	2001	Michael Herbig	14 281 570
15	Taxi 2	FR	2000	Gérard Krawczyk	13 159 230
16	Billy Elliot	GB/FR	2000	Stephen Daldry	12 900 900
17	About a Boy	GB/US/FR/DE	2002	Paul Weitz, Chris Weitz	10 941 858
18	Le dîner de cons	FR	1998	Francis Veber	10 921 930
19	Good bye, Lenin!	DE	2003	Wolfgang Becker	10 785 933
20	(T)Raumschiff Surprise - Periode 1	DE	2004	Michael Herbig	10 759 402
21	Les choristes	FR/CH	2004	Christophe Barratier	10 649 907
22	Alexander	GB/FR/NL/US	2004	Oliver Stone	9 556 807
23	Trainspotting	GB/US	1996	Danny Boyle	9 506 439
24	Der Untergang	DE/IT	2004	Oliver Hirschbiegel	9 505 824
25	Le pacte des loups	FR	2001	Christophe Gans	9 092 046

Note: Does not include films produced in Europe with US inward investment.

Source: OBS/LUMIERE

The tables below are provisional rankings on the basis of data from 24 European countries (including Turkey) - around 85% of admissions in the European Union countries are analysed.

### Top 25 films by admissions in Europe | 2005

	Original title	Country of origin	Year	Director	Admissions
1	Harry Potter and the Goblet of Fire	GB inc/US	2005	Mike Newell	41 083 856
2	Star Wars III - Revenge of the Sith	US	2005	George Lucas	33 063 194
3	Madagascar	US	2005	E. Darnell & T. McGrath	29 447 055
4	War of the Worlds	US	2005	Steven Spielberg	23 907 377
5	Charlie and the Chocolate Factory	GB inc/US	2005	Tim Burton	20 215 179
6	Meet the Fockers	US	2004	Jay Roach	20 012 657
7	The Chronicles of Narnia I	US/NZ inc	2005	Andrew Adamson	18 688 817
8	Mr. and Mrs. Smith	US	2004	Doug Liman	18 343 767
9	Hitch	US	2005	Andy Tennant	15 875 427
10	King Kong	US/NZ inc	2005	Peter Jackson	14 114 083
11	Wallace & Gromit: Curse of the...	GB inc/US	2005	Nick Park & Steve Box	12 818 548
12	Kingdom of Heaven	GB inc/DE/ES/US	2005	Ridley Scott	12 110 415
13	Fantastic Four	US/DE	2005	Tim Story	11 053 616
14	Batman Begins	US/GB inc	2005	Christopher Nolan	10 521 676
15	Million Dollar Baby	US	2004	Clint Eastwood	10 512 504
16	Robots	US	2005	C. Wedge & C. Saldanha	9 527 882
17	Ocean's Twelve (1)	US/AU inc	2004	Steven Soderbergh	8 630 547
18	Flightplan	US	2005	Robert Schwentke	8 624 879
19	The Aviator	US/JP	2004	Martin Scorsese	8 081 638
20	Constantine	US	2005	Francis Lawrence	7 651 722
21	Alexander (2)	GB/FR/NL/US	2004	Oliver Stone	7 497 599
22	The Interpreter	US/GB/FR	2005	Sydney Pollack	7 297 343
23	The Legend of Zorro	US	2005	Martin Campbell	7 234 848
24	The Island	US	2005	Michael Bay	7 111 678
25	Sin City	US	2005	R. Rodriguez & F.Miller	6 936 736

(1) 7 690 669 admissions in Europe in 2004.

(2) 2 059 208 admissions in Europe in 2004.

Source: OBS/LUMIERE

### Top 25 European films by admissions in Europe | 2005

	Original title	Country of origin	Year	Director	Admissions
1	Alexander (1)	GB/FR/NL/US	2004	Oliver Stone	7 497 599
2	Pride and Prejudice	GB/FR/US	2005	Joe Wright	4 728 894
3	Brice de Nice	FR	2005	James Huth	4 585 203
4	La marche de l'empereur	FR	2004	Luc Jacquet	4 258 873
5	Der Untergang (2)	DE/IT	2004	Oliver Hirschbiegel	4 111 463
6	Oliver Twist	FR/CZ/GB	2005	Roman Polanski	3 951 108
7	Torrente 3, El protector	ES	2005	Santiago Segura	3 551 138
8	Nanny McPhee	GB/US/FR	2005	Kirk Jones	3 517 382
9	Les poupées russes	FR/GB	2005	Cédric Klapisch	3 304 198
10	Bridget Jones: The Edge of Reason (3)	GB/US/FR/DE/IE	2004	Beeban Kidron	3 133 733
11	Hababam Sinifi Askerde	TR	2005	Ferdi Ergilmez	2 896 425
12	La tigre et la neve	IT	2005	Roberto Benigni	2 848 601
13	Match Point	GB/US/LU	2005	Woody Allen	2 740 077
14	Iznogoud	FR	2005	Patrick Braoudé	2 656 819
15	Manuale d'amore	IT	2005	Giovanni Veronesi	2 644 146
16	Transporter 2	FR	2005	Louis Leterrier	2 560 576
17	Palais royal!	FR/GB	2005	Valérie Lemercier	2 478 005
18	Natale a Miami	IT	2005	Neri Parenti	2 415 433
19	Die weiße Massai	DE	2005	Hermine Huntgeburth	2 329 939
20	Sprung! The Magic Roundabout	FR/GB	2005	D. Borthwick & J. Duval	2 247 834
21	Joyeux Noël	FR/DE/GB/BE/RO	2005	Christian Carion	2 163 412
22	Danny the Dog	FR/GB	2005	Louis Leterrier	2 087 917
23	Karol. Człowiek, który został Papieżem	PL/IT	2005	Giacomo Battiato	1 878 124
24	Espace détente	FR	2005	Yvan Le Bolloc'h, Bruno Solo	1 824 739
25	Tout pour plaire	FR/BE	2005	Cécile Teerman	1 696 210

(1) 2 059 208 admissions in Europe in 2004.

(2) 5 394 361 admissions in Europe in 2004.

(3) 16 231 612 admissions in Europe in 2004.

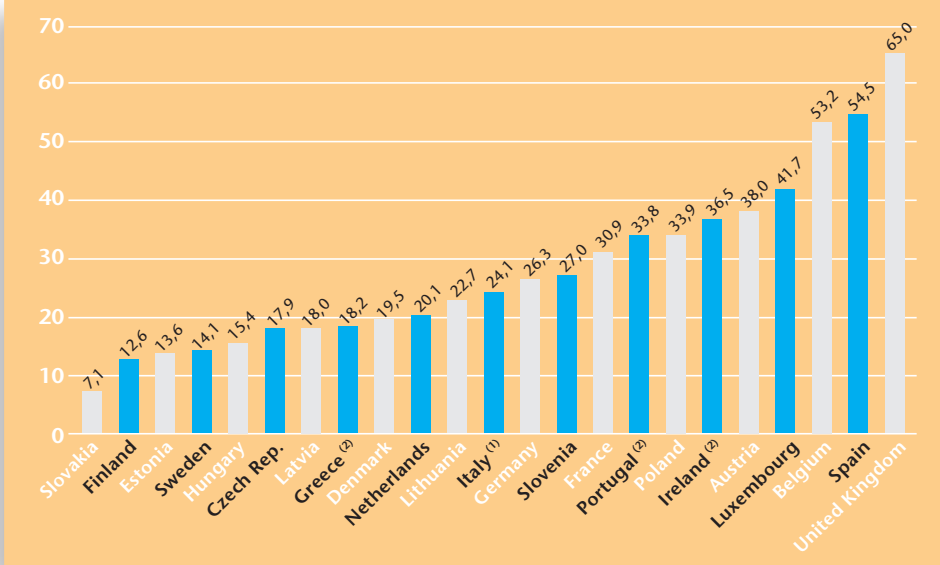
Note: Does not include films produced in Europe with US inward investment.

Source: OBS/LUMIERE

## Screens in multiplexes | 2004

Screens in multiplexes (complexes of 8 screens or more) as a percentage the total number of screens.

Source: MEDIA Salles



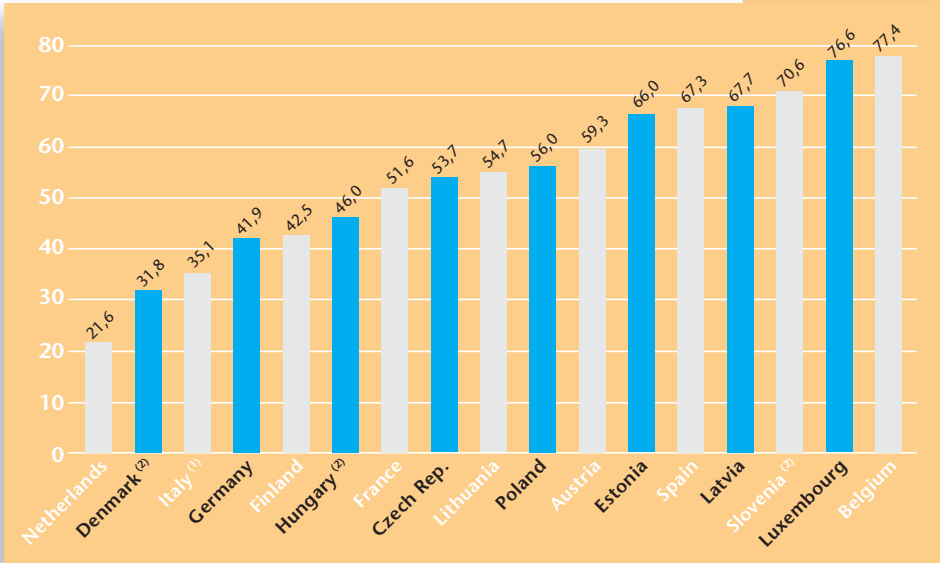
(1) Screens with more than 60 days of activity per year.

(2) 2003.

## Admissions in multiplexes | 2004

Attendance in multiplexes (complexes of 8 screens or more) as a percentage of total cinema attendance.

Source: MEDIA Salles

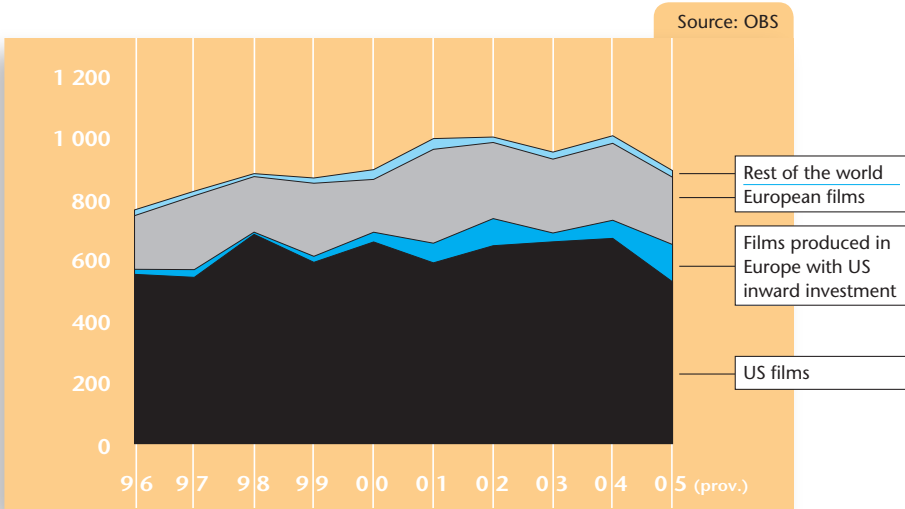


(1) Screens with more than 60 days of activity per year.

(2) 2003.

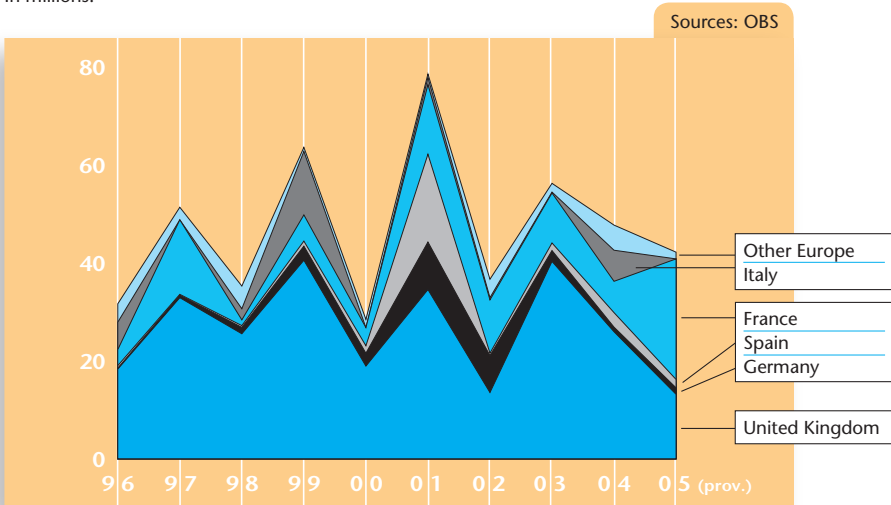
### Admissions in the European Union | 1996-2005

In millions.



### Admissions to European films on the North American market | 1996-2005 est

In millions.

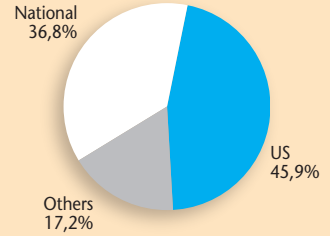


Note: Does not include films produced in Europe with US inward investment such as the *Harry Potter* series or *Un long dimanche de fiançailles*.

# France

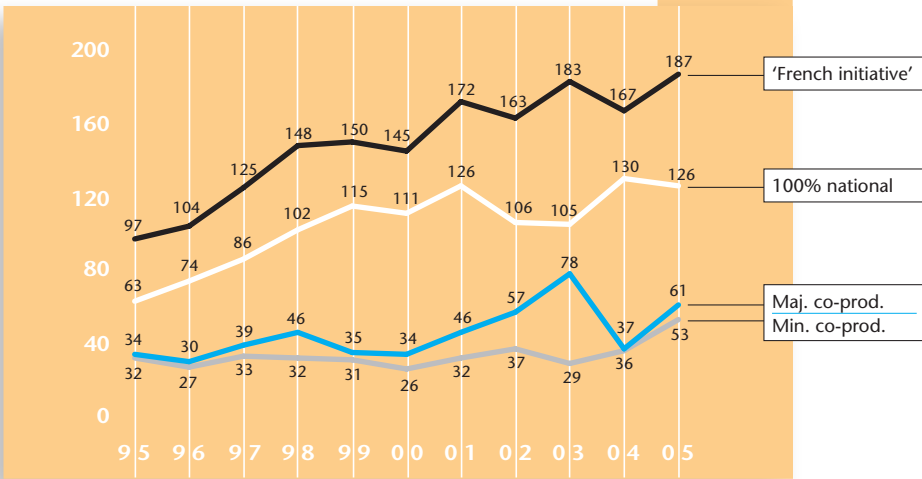
Population 2005	62,7 million
GDP 2004	2 047 billion USD
1 USD	0,82 EUR (March 2006)
Admissions 2005	175,65 million <b>prov.</b>
Average admissions/inhab. 2005	2,80
Average ticket price 2004	5,82 EUR (= 7,23 USD)
Screens 2004	5 302
Screens in multiplexes 2004	30,9%
Admissions in multiplexes 2004	51,6%

## Market shares 2005 est



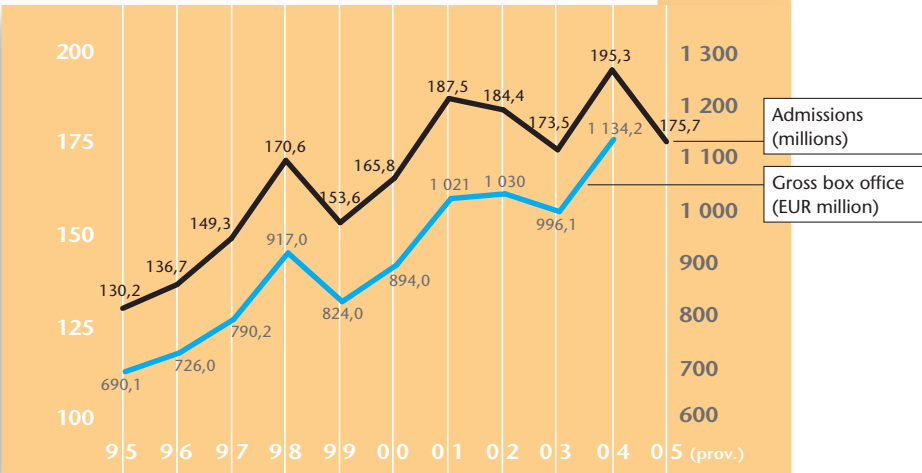
## Number of officially recognised feature films produced | 1995-2005

Source: CNC



## Admissions and gross box office | 1995-2005

Source: CNC



## Top 20 films by admissions in France | 2005

	Original title	Country of origin	Director	Admissions
1	Harry Potter and the Goblet of Fire (1)	GB inc/US	Mike Newell	7 248 158
2	Star Wars: Episode III - Revenge of the Sith	US	George Lucas	7 246 422
3	Brice de Nice	FR	James Huth	4 342 215
4	Charlie and the Chocolate Factory (1)	GB inc/US	Tim Burton	4 150 910
5	War of the Worlds	US	Steven Spielberg	3 905 089
6	Million Dollar Baby	US	Clint Eastwood	3 210 799
7	Madagascar (1)	US	Eric Darnell & Tom McGrath	3 178 180
8	Mr. and Mrs. Smith	US	Doug Liman	2 968 850
9	Les poupées russes (1)	FR/GB	Cédric Klapisch	2 894 803
10	Iznogoud	FR	Patrick Braoudé	2 498 877
11	Palais royal! (1)	FR	Valérie Lemercier	2 423 080
12	King Kong (1)	US/NZ inc	Peter Jackson	2 289 987
13	Fantastic Four	US/DE	Tim Story	2 223 590
14	Wallace & Gromit: Curse of the Were-Rabbit	GB inc/US	Nick Park & Steve Box	2 193 108
15	Legend of Zorro	US	Martin Campbell	2 137 086
16	Hitch	US	Andy Tennant	2 108 581
17	La marche de l'empereur (1)	FR	Luc Jacquet	1 867 518
18	Joyeux Noël (1)	FR/DE/GB/BE/RO	Christian Carion	1 840 172
19	The Chronicles of Narnia I (1)	US/NZ inc	Andrew Adamson	1 813 554
20	Espace détente	FR	Yvan Le Bolloc'h & Bruno Solo	1 787 163

(1) Still on release in 2006.

Source: Le film français

## Production

Production volume reached a new record in France in 2005, with a total of 240 features receiving official recognition, 37 films more than in 2004 and 28 films more than the previous record of 212 films in 2003. The increase is principally due to a surge in the number of co-productions involving French producers. 61 films were made as majority co-productions in 2005, 24 films more than in 2004. Minority co-productions also rose steeply, passing from 36 in 2004 to 53 in 2005. Among the co-productions a marked increase in the number of films produced under the European Convention on Cinematographic Co-production was noted (39 in 2005, as opposed to 25 in 2004). Belgium and Italy were the preferred co-production partners and the number of productions with Canada showed a steep increase (10 in 2005, 1 in 2004).

The overall volume of investment in French production in 2005 was 933.7 million EUR, a 4.6% increase on the figure for 2004. Average budgets per film fell back to 4.99 million EUR (5.34 million EUR in 2004) but this figure still remains superior to those of the years prior to 2004. Lower

budgeted films (less than 1 million EUR) were once again an important component of production volume in 2005 after a significant decline in 2004. Among the 41 films with a budget under 1 million EUR in 2005, 19 were documentaries. 12 films had budgets in excess of 15 million EUR, as opposed to 9 in 2004.

## Distribution and exhibition

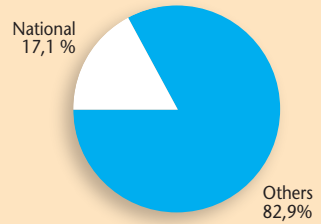
175.65 million tickets were sold in French cinemas in 2005, a 10.1% drop in relation to the high point of 195.33 million admissions in 2004, but still a 1.3% increase in relation to 2003. In common with many other European markets, admissions were down year-on-year for the first 11 months of 2005, and rose significantly in December, ending the year on a positive note. Around 64.8 million of the tickets sold in 2005 were for French films, giving a national market share of 36.8% (38.6% in 2004). US films captured an estimated 45.9% of the market, while films of other origins represented 17.2%.

Source: CNC

# Germany

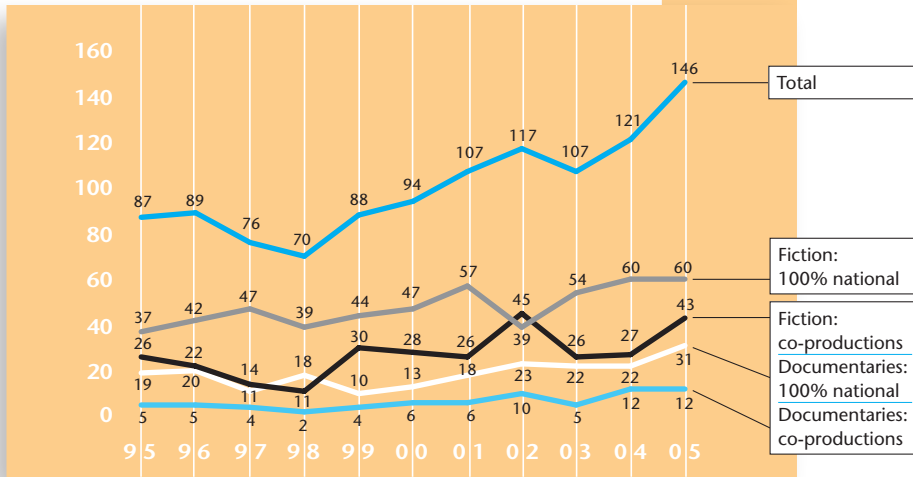
Population 2005	82,5 million
GDP 2004	2 741 billion USD
1 USD	0,82 EUR (March 2006)
Admissions 2005	127,3 million
Average admissions/inhab. 2005	1,54
Average ticket price 2005	5,85 EUR (= 7,27 USD)
Screens 2005	4 889
Screens in multiplexes 2004	26,3%
Admissions in multiplexes 2004	41,9%

## Market shares 2005



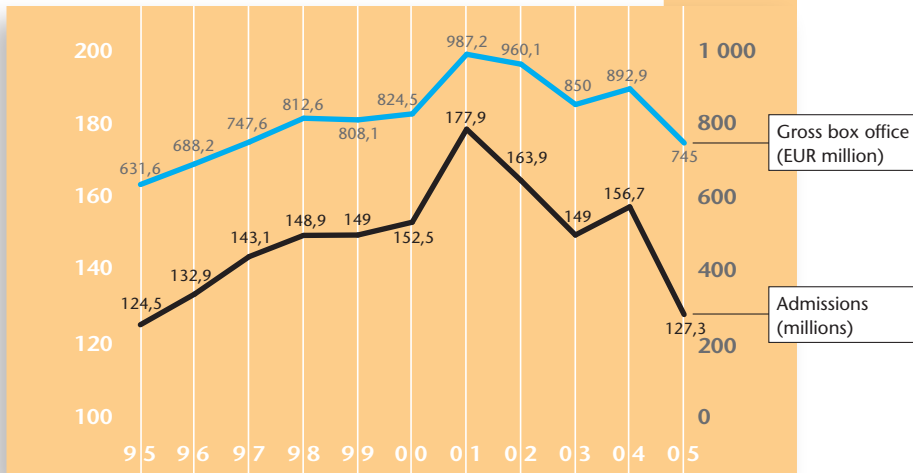
## Number of German feature films on first release | 1995-2005

Source: SPIO



## Admissions and gross box office | 1995-2005

Sources: FFA





## Top 20 films by admissions in Germany | 2005

	Original title	Country of origin	Director	Admissions
1	Harry Potter and the Goblet of Fire (1)	GB inc/US	Mike Newell	7 312 059
2	Madagascar	US	Eric Darnell & Tom McGrath	6 686 992
3	Star Wars: Episode III - Revenge of the Sith	US	George Lucas	5 609 645
4	Hitch	US	Andy Tennant	4 334 077
5	Mr. & Mrs. Smith	US	Alfred Hitchcock	3 566 570
6	Meet the Fockers	US	Jay Roach	3 139 471
7	The Chronicles of Narnia I (1)	US/NZ inc	Andrew Adamson	2 722 661
8	War of the Worlds	US	Steven Spielberg	2 715 259
9	Die weiße Massai	DE	Hermine Huntgeburth	2 156 934
10	Kingdom of Heaven	GB inc/DE/ES/US	Ridley Scott	1 950 354
11	Flightplan	US	Robert Schwentke	1 938 458
12	King Kong (1)	US/NZ inc	Peter Jackson	1 790 386
13	Robots	US	C. Wedge & C. Saldanha	1 687 806
14	Die wilden Kerle II	DE	Joachim Masannek	1 579 812
15	Barfuss	DE	Til Schweiger	1 506 534
16	Wallace & Gromit: Curse of the Were-Rabbit	GB inc /US	Nick Park, Steve Box	1 447 093
17	Der kleine Eisbär 2 - Die geheimnisvolle Insel	DE	T. Rothkirch & P. de Rycker	1 323 721
18	Siegfried	DE	Sven Unterwaldt Jr.	1 321 443
19	The Incredibles (2)	US	Brad Bird	1 301 982
20	The Pacifier	US/CA inc	Adam Shankman	1 244 891

(1) Still on release in 2006.

(2) 2 199 987 in 2004.

Source: FFA

## Production

Production volumes in Germany continued to rise in 2005, with a total of 146 new titles released during the year. This represents a 21% increase on the 2004 total of 121 films. International co-productions and documentary features were the principle contributors to growth, with 43 fiction co-productions released, up from 27 in 2004. 25 out of these 43 films involved a German co-producer as a minority partner, whilst 18 were German majority co-productions. Renewed interest in documentary production was confirmed in 2005, with a total of 43 documentary titles released (from 34 in 2004). 12 of these 2005 documentary features were co-productions, of which 9 involved a German co-producer as majority partner.

Changes to the income tax code applicable from November 2005 brought a definitive end to the German media funds, generally considered as benefiting principally US production. Under the incoming coalition government, discussions opened on developing alternative financing structures, possibly along the lines of the fiscal incentive systems already in operation in a number of other European countries.

## Exhibition & distribution

Germany was one of the countries hardest hit by falling ticket sales in 2005, with admissions sinking by 18.8%, bringing attendance back to the level of 1995. Gross box office showed a slightly smaller drop of 16.6%. Poor performances by a number of US films was highlighted as a probable cause though there was also concern over the continued shrinkage of the window from theatrical to video release. In August 2005 a number of exhibitors temporarily blocked the screening of 2 films distributed by Buena Vista International in protest at a DVD window shortened to 4 rather than 6 months.

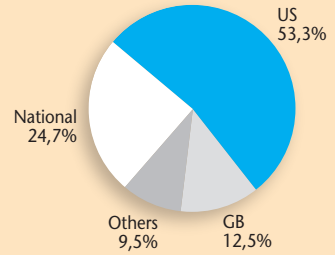
Local production earned an overall market share of 17.1% of admissions, a drop in relation to the 23.8% registered in 2004, but still one of the better scores of the decade. Three local productions had featured in the Top 10 films of 2004 but in 2005 only one local film, *Die weiße Massai*, found a place in the Top 10. UIP (23.4%), Warner (16.9%) and Buena Vista (14.6%) were once again the top 3 distributors, while Constantin was the leading independent, in 6th place with a market share of 6.4%.

Sources: SPIO/FFA/Blickpunkt

# Italy

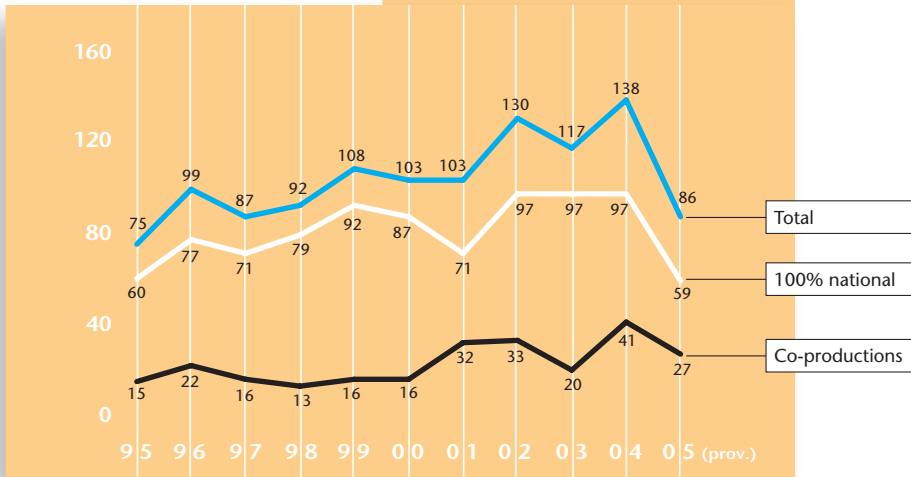
Population 2005	58,5 million
GDP 2004	1 678 billion USD
1 USD	0,82 EUR (March 2006)
Admissions 2005 <b>est</b>	108 million
Average admissions/inhab. 2005 <b>est</b>	1,84
Average ticket price 2005 <b>est</b>	5,70 EUR (= 7,08 USD)
Screens 2004	3 171
Screens in multiplexes 2004	24,1%
Admissions in multiplexes 2004	35,1%

## Market shares 2005



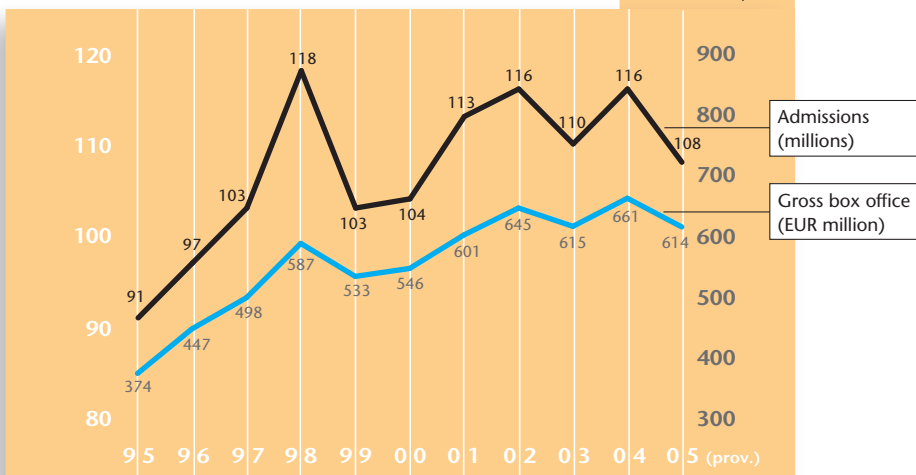
## Number of feature films produced in Italy | 1995-2005

Sources: ANICA (1995-1999)/OIA (2000-2005)



## Admissions and gross box office | 1995-2005

Sources: SIAE/OIA



## Top 20 films by admissions in Italy | 2005

	Original title	Country of origin	Director	Admissions
1	Madagascar	US	Eric Darnell & Tom McGrath	3 622 864
2	Harry Potter and the Goblet of Fire (1)	GB inc/US	Mike Newell	3 227 512
3	La tigre e la neve	IT	Roberto Benigni	2 499 964
4	Natale a Miami (1)	IT	Neri Parenti	2 415 433
5	Meet the Fockers	US	Jay Roach	2 369 757
6	Manuale d'amore	IT	Giovanni Veronesi	2 345 815
7	War of the Worlds	US	Steven Spielberg	2 196 864
8	Charlie and the Chocolate Factory	GB inc/US	Tim Burton	1 850 959
9	Ti amo in tutte le lingue del mondo (1)	IT	Leonardo Pieraccioni	1 682 359
10	Bridget Jones: The Edge of Reason	GB/US/FR/DE/IE	Beeban Kidron	1 643 059
11	Shark Tale	US	Bergeron, Jenson & Letterman	1 527 585
12	Fantastic Four	US/DE	Tim Story	1 526 803
13	Shrek 2 (2)	US	Adamson, Asbury & Vernon	1 409 334
14	Alexander	GB/FR/NL/US	Oliver Stone	1 395 952
15	Star Wars: Episode III - Revenge of the Sith	US	George Lucas	1 384 819
16	The Chronicles of Narnia I (1)	US/NZ inc	Andrew Adamson	1 360 872
17	Million Dollar Baby	US	Clint Eastwood	1 320 437
18	Kingdom of Heaven	GB inc/DE/ES/US	Ridley Scott	1 259 355
19	Hitch	US	Andy Tennant	1 251 135
20	Batman Begins	US/GB inc	Christopher Nolan	1 163 263

(1) Still on release in 2006.

(2) 2 270 718 in 2004.

Source: Cinetel

## Production

The volume of feature film production in Italy slipped back in 2005 in comparison to a record high of 138 films completed in 2004. An estimated 86 films were produced in 2005, 52 less than in the preceding year. 59 of these films were entirely nationally financed and 27 were co-productions. Announcements in autumn 2005 of further budgetary cuts to the State support fund for the entertainment industry were greeted with dismay by industry professionals and provoked a nationwide strike in October 2005.

## Distribution

The Italian market appears to have been less affected by the prevailing trend towards declining admissions than the other major continental markets in 2005. Estimates by the Osservatorio italiano dell'audiovisivo situate total attendance in 2005 at around 108 million admissions (116 million in 2004) on the basis of a 7.5% decline observed in the Cinetel-tracked sample. Total box office is estimated at 614 million EUR, down from 661 million in 2004.

Despite declining admissions and box office, 2005 was a positive year for nationally produced films. Around 22.5 million tickets were sold to Italian films (including co-productions) in 2005, 2.4 million more than were sold in 2004 (20.1 million). As a result, the market share for national films moved upwards to reach 24.7% of total admissions (20.3% in 2004). This represents the best score since 1998.

The most popular domestic film of the year was Roberto Benigni's *La tigre e la neve*, which sold 2.5 million tickets and figured at third place in the annual ranking. Three other Italian films figured in the top 10, Christmas comedy *Natale a Miami* at 4th place and romantic comedies *Manuale d'amore* and *Ti amo in tutte le lingue del mondo* in 6th and 9th place respectively.

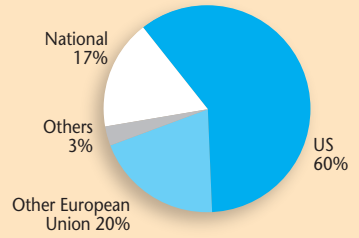
In November 2005 an Italian mobile phone network planned to offer a feature film for viewing on telephones just one week after its theatrical release. Protests from exhibitors and withdrawal of the film from a number of screens led to the withdrawal of the offer, but the incident has prompted discussion both in Italy and elsewhere on both the legal ownership of rights to mobile distribution and the regulation of windows.

Sources: OIA/ANICA/Cinetel/  
Giornale dello Spettacolo

# Spain

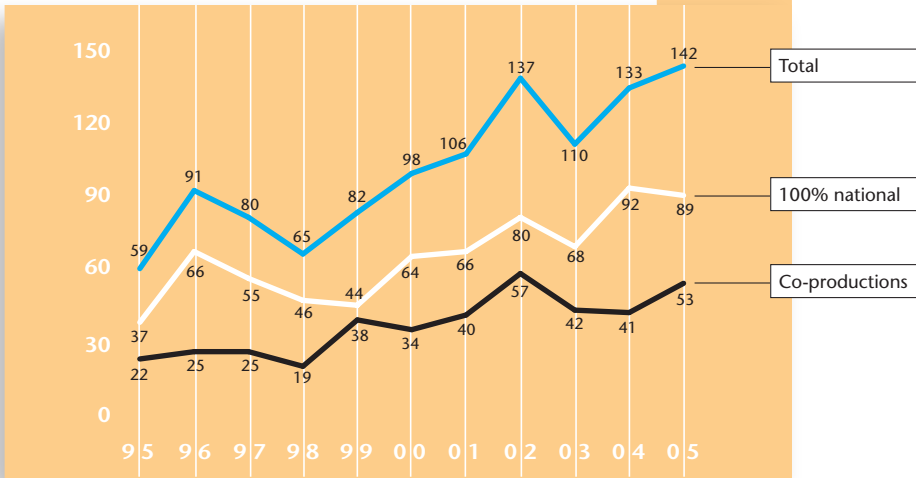
Population 2005	44,1 million
GDP 2004	1 040 billion USD
1 USD	0,82 EUR (March 2006)
Admissions 2005	126,0 million
Average admissions/inhab. 2005	2,86
Average ticket price 2005	4,98 EUR (= 6,19 USD)
Screens 2005	4 383
Screens in multiplexes 2004	54,5%

## Market shares 2005



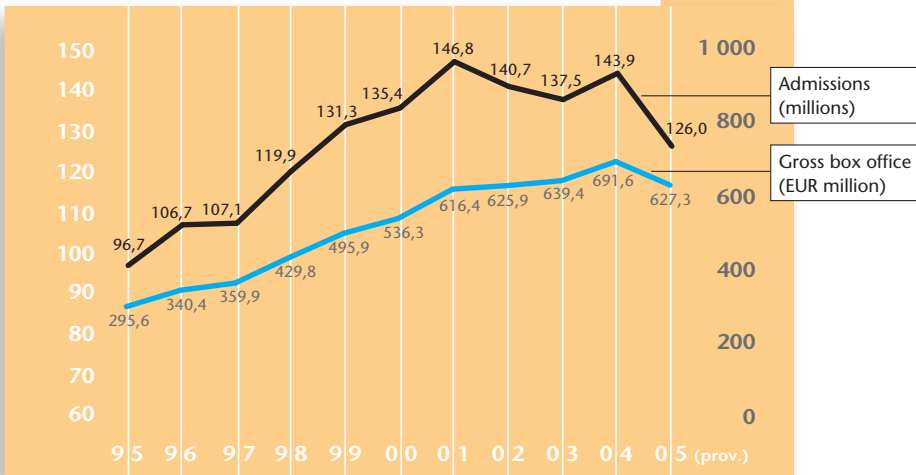
## Number of feature films produced in Spain | 1995-2005

Source: ICAA



## Admissions and gross box office | 1995-2005

Source: ICAA



## Top 20 films by admissions in Spain | 2005

	Original title	Country of origin	Director	Admissions
1	Star Wars: Episode III - Revenge of the Sith	US	George Lucas	3 672 541
2	Torrente 3, El protector	ES	Santiago Segura	3 551 138
3	Harry Potter and the Goblet of Fire (1)	GB inc/US	Mike Newell	3 449 468
4	War of the Worlds	US	Steven Spielberg	3 325 362
5	Madagascar	US	Eric Darnell & Tom McGrath	2 821 752
6	Meet the Fockers	US	Jay Roach	2 699 605
7	Fantastic Four	US/DE	Tim Story	2 617 834
8	Mr. and Mrs. Smith	US	Doug Liman	2 548 112
9	The Chronicles of Narnia I (1)	US/NZ inc	Andrew Adamson	2 539 591
10	Million Dollar Baby	US	Clint Eastwood	2 459 969
11	Kingdom of Heaven	GB inc/DE/ES/US	Ridley Scott	2 374 661
12	Alexander	GB/FR/NL/US	Oliver Stone	2 201 450
13	Charlie and the Chocolate Factory	GB inc/US	Tim Burton	1 703 260
14	Chicken Little (1)	US	Mark Dindal	1 647 133
15	King Kong (1)	US/NZ inc	Peter Jackson	1 603 593
16	Legend of Zorro	US	Martin Campbell	1 583 909
17	Flightplan	US	Robert Schwentke	1 579 257
18	Robots	US	C. Wedge & C. Saldanha	1 545 571
19	The Island	US	Michael Bay	1 496 149
20	Batman Begins	US/GB inc	Christopher Nolan	1 451 915

(1) Still on release in 2006.

Source: ICAA

### Distribution and exhibition

Attendance at Spanish cinemas fell back by 12.5% in 2005, with 126 million tickets sold (143.9 million in 2004). Box office receipts totalled 627.3 million EUR, a drop of 9.3% in relation to 2004. While in 2004 9 films had crossed the 3 million admissions mark, in 2005 only 4 films entered this category, with the highest ranked film *Star Wars: Episode III* selling 3.7 million tickets, compared to the 6.2 million sold for *Shrek 2* in 2004.

Market share for national films was higher than in the preceding year, reaching 16.7% (13.4% in 2004). Spanish co-productions *Kingdom of Heaven* and *Sahara* are included in this total. The 2005 result represents the second best score of the last 15 years, with the exception of 2001 when national market share reached 17.8%. The most popular local film in 2005 was comedy *Torrente 3, El protector*, with 3.5 million admissions, bringing it into second place in the overall ranking behind *Star Wars: Episode III*. With co-production *Kingdom of Heaven* at number 11, *Torrente 3* was one of only two Spanish films to enter the top 20 in 2005.

### Production

142 feature films involving a Spanish producer were completed in 2005, an additional 9 films in relation to the total for 2004 (133). 89 entirely national films were produced, maintaining this type of production at the very high level observed in 2004 (92 films). However, the increase in volume came principally from growth in the number of co-productions involving Spanish co-producers (from 41 in 2004 to 53 in 2005). France, the United Kingdom and Italy were the preferred European co-production partners and the number of co-productions with Argentina and Chile was also on the increase.

In an innovatory move, the Spanish government announced at the end of 2005 the creation of a new mutual guarantee fund for the audiovisual sector, with the aim of providing easier access to bank loans for small and medium size businesses wishing to finance activity in the production, distribution, exhibition and technical sectors. With an initial capital of over 6 million EUR, the fund started operation in early 2006.

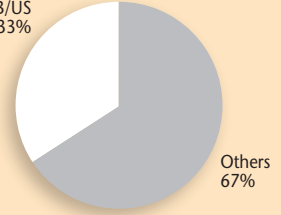
Sources: ICAA /Cine por la red

# United Kingdom

Population 2004	59,8 million
GDP 2004	2 133 billion USD
1 USD	0,57 GBP (March 2006)
Admissions 2005	164,7 million
Average admissions/inhab. 2005	2,75
Average ticket price 2005	4,68 GBP (= 8,51 USD)
Screens 2005	3 486
Screens in multiplexes 2004	65,0%

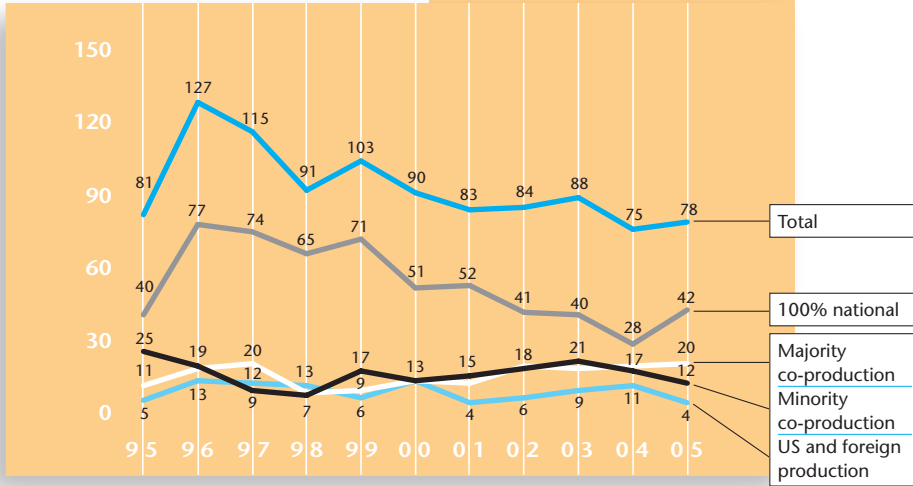
## UK & Ireland market shares 2005 est

GB & GB/US  
33%



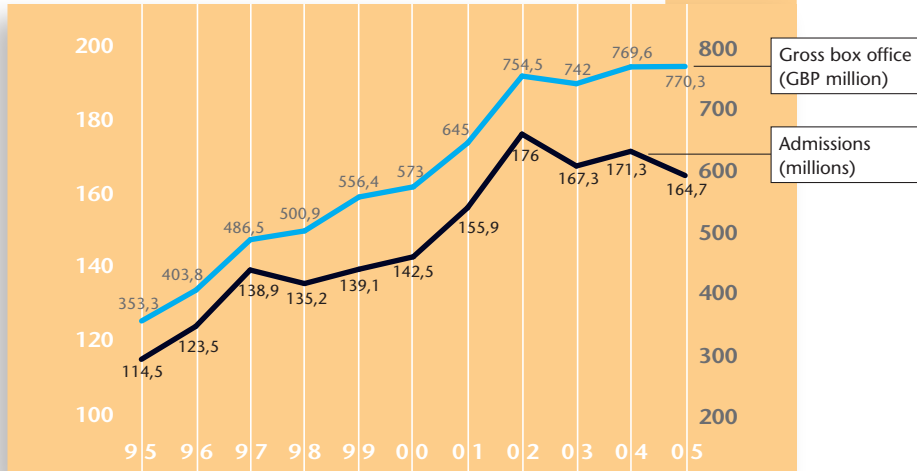
## Number of feature films produced in the United Kingdom | 1995-2005

Sources: X25 Partnership/Screen Finance



## Admissions and gross box office | 1995-2005

Source: CAA



## Top 20 films by gross box office in the United Kingdom and Ireland | 2005

	Original title	Country of origin	Director	Gross box office (GBP)
1	Harry Potter and the Goblet of Fire (1)	GB inc/US	Mike Newell	46 967 491
2	Star Wars: Ep. III - Revenge of the Sith	US	George Lucas	39 433 983
3	Charlie and the Chocolate Factory	GB inc/US	Tim Burton	37 462 140
4	The Chronicles of Narnia I (1)	US/NZ inc	Andrew Adamson	36 148 321
5	Wallace & Gromit: Curse of the Were-Rabbit (1)	GB inc/US	Steve Box & Nick Park	31 980 281
6	War of the Worlds	US	Steven Spielberg	30 648 315
7	Meet the Fockers	US	Jay Roach	28 925 095
8	King Kong (1)	US/NZ inc	Peter Jackson	23 919 605
9	Madagascar	US	E. Darnell & T. McGrath	22 654 878
10	Hitch	US	Andy Tennant	17 393 848
11	Nanny McPhee (1)	GB/US/FR	Kirk Jones	16 461 351
12	Batman Begins	US/GB inc	Christopher Nolan	16 420 140
13	Pride and Prejudice	GB/FR/US	Joe Wright	14 568 128
14	Mr. & Mrs. Smith	US	Doug Liman	13 592 244
15	Wedding Crashers	US	David Dobkin	13 163 614
16	Fantastic Four	US/DE	Tim Story	12 708 024
17	Ocean's Twelve	US/AU inc	Steven Soderbergh	12 576 177
18	Robots	US	C. Wedge & C. Saldanha	12 481 216
19	The Hitchhiker's Guide to the Galaxy	GB inc/US	Garth Jennings	10 669 714
20	Valiant	GB inc/US	Gary Chapman	8 516 938

(1) Still on release in 2006.

Source: UK Film Council/Nielsen EDI

### Production

Data from *Screen Finance* on the number of film starts in 2005 shows that the total volume of films going into production increased to 78 films, up from the 2004 total of 75. Recovery was particularly notable in the entirely nationally financed category, which had declined sharply in 2004, while the number of majority co-productions remained largely stable. Minority co-productions fell back, however, as did inward investment projects shooting in the UK. 4 such projects were noted in 2005, as against 11 in 2004.

Data from UK Film Council International shows that the total value of investment in production (both inward and domestic) recorded for the year was 568.8 million GBP, a 30% drop on the level for 2004 (811.9 million GBP). The value of inward investment fell back steeply, reflecting both the weakness of the US dollar against sterling but also uncertainty over future tax incentives for film production. This uncertainty was brought to an end with the Government's December 2005 announcement of the new system to be implemented in 2006.

### Distribution and exhibition

The United Kingdom was one of the European markets least affected by the generalised downward trend in admissions in 2005. 164.7 million admissions to cinemas were registered during the year, a 3.8% decrease on the total for 2004 (171.3 million). Box office receipts remained stable, registering a total of 770.3 million GBP, a 0.1% rise on the figure for 2004 (769.6 million GBP). A very strong final quarter provided sufficient compensation for the disappointing results registered during the summer months.

UK films achieved an estimated market share of 33% of UK and Irish box office in 2005, a marked improvement on the 23% registered in 2004. These figures take into account productions categorised as 'inward investment' to the United Kingdom; films such as *Harry Potter and the Goblet of Fire*, *Batman Begins* or *Charlie and the Chocolate Factory*, as well as a number of international co-productions made under the European Convention on Cinematographic Co-production (*Sahara* or *Kingdom of Heaven*). Nonetheless, British themes and/or literary works remained the inspiration for 9 out of the 20 top films in 2005.

Sources: CAA/Screen Finance/UK Film Council

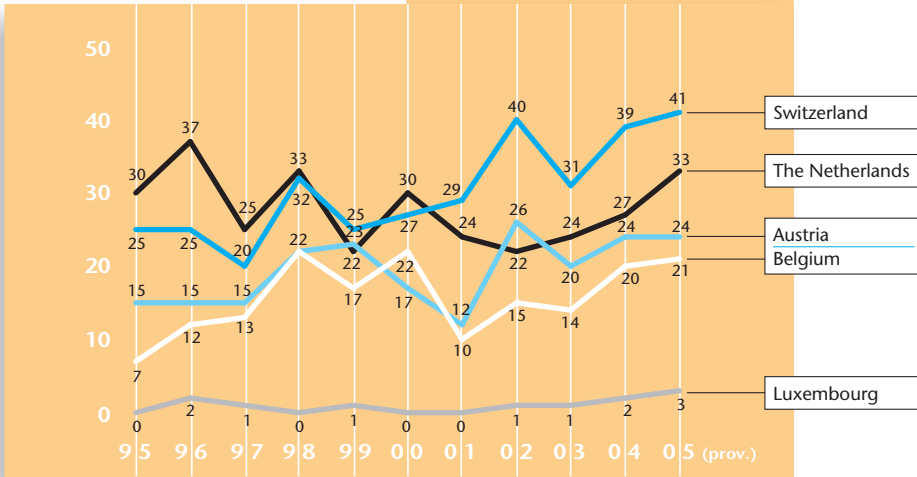
# Austria - Benelux - Switzerland

	Austria	Belgium	Switzerland	Luxembourg	Netherlands
Population 2004 (millions)	8,2	10,4	7,5 <sup>(1)</sup>	0,5	16,2
GDP 2004 (USD billions)	292	353	359	32	564
1USD (March 2006)	0,82 EUR	0,82 EUR	1,31 CHF	0,82 EUR	0,82 EUR
Admissions 2005 (millions)	15,7	21,7 <i>est</i>	15,0	1,2 <i>est</i>	20,6
Admissions/inhabitant 2005	1,94	2,09 <i>est</i>	2,06	2,57	1,26
Share national films 2005	-	5,4%	5,9%	-	13,6%

(1) 2005

## Number of feature films produced in Austria, Belgium, Luxembourg, the Netherlands and Switzerland | 1995-2005

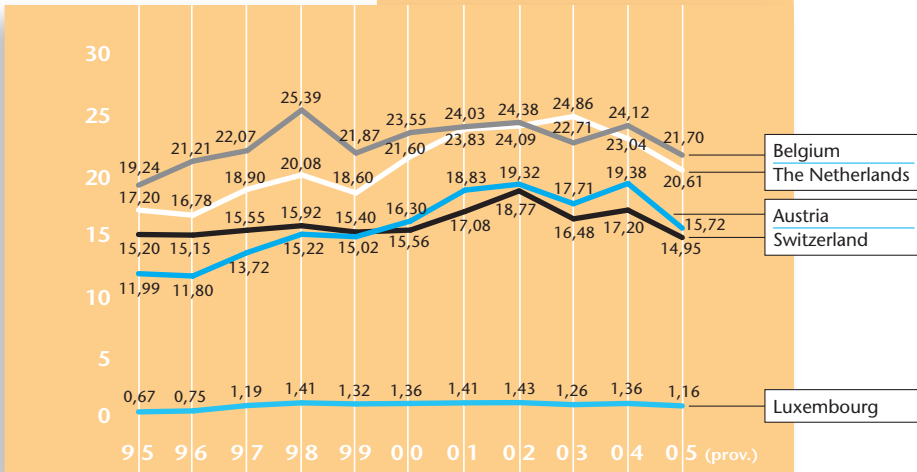
Sources: FAF/OFS/NVF-NVB/MFB/CNA/OBS



## Admissions in Austria, Belgium, Luxembourg, the Netherlands and Switzerland | 1995-2005

In millions.

Sources: INS/MfB/NVF-NVB/OFS/FAF/CNA/OBS





## Top 20 films by admissions in Belgium, Luxembourg and the Netherlands | 2005

Original title	Belgium	Luxembourg <sup>(1)</sup>	Netherlands	Total
1 Harry Potter and the Goblet of Fire (2)	1 106 322	42 500	1 015 897	2 164 719
2 Madagascar	703 925	48 700	997 492	1 750 117
3 War of the Worlds	564 742	25 300	684 502	1 274 544
4 Star Wars: Episode III - Revenge of the Sith	575 345	31 800	561 726	1 168 871
5 Mr. and Mrs. Smith	603 694	27 800	531 981	1 163 475
6 Charlie and the Chocolate Factory (2)	411 488	20 200	668 202	1 099 890
7 Meet the Fockers	504 469	23 700	397 460	925 629
8 Hitch	396 566	32 700	446 892	876 158
9 Ocean's Twelve	480 011	11 500	341 851	833 362
10 Kingdom of Heaven	346 521	11 000	332 249	689 770
11 Flightplan	405 184	14 400	264 751	684 335
12 King Kong	371 439	13 900	266 521	651 860
13 National Treasure (3)	353 974	7 200	287 688	648 862
14 Herbie: Fully Loaded	355 148	11 900	227 825	594 873
15 The Pacifier	301 660	11 400	273 551	586 611
16 The Chronicles of Narnia I	331 597	17 700	215 598	564 895
17 The SpongeBob Squarepants Movie	126 577	11 000	414 582	552 159
18 Robots	258 359	18 000	235 502	511 861
19 Wallace & Gromit: Curse of the Were-Rabbit	251 613	18 700	231 963	502 276
20 Chicken Little	256 392	-	237 665	494 057

(1) Provisional data on the basis of Top 50 films only.

(2) Belgian data is the cumulative admissions to 20 January 2006.

(3) 227 679 admissions in Belgium in 2004.

Sources: *Moniteur du film en Belgique*/Utopia/NVF-NVB

## Top 20 films by admissions in Austria and Switzerland | 2005

Original title	Austria <sup>(1)</sup>	Switzerland	Total
1 Madagascar	792 138	660 374	1 452 512
2 Harry Potter and the Goblet of Fire	699 372	612 090	1 311 462
3 Mr. & Mrs. Smith	508 210	400 787	908 997
4 Hitch	477 679	424 483	902 162
5 Meet the Fockers	516 845	380 404	897 249
6 Star Wars III - Revenge of the Sith	491 973	381 229	873 202
7 The Chronicles of Narnia I	312 834	216 260	529 094
8 War of the Worlds	283 660	241 301	524 961
9 Ocean's Twelve (2)	350 217	168 572	518 789
10 Mein Name ist Eugen	-	488 849	488 849
11 Kingdom of Heaven	227 528	205 797	433 325
12 Charlie and the Chocolate Factory	200 700	223 049	423 749
13 The Pacifier	229 446	158 351	387 797
14 Blade Trinity (3)	214 432	90 539	304 971
15 Ray	-	249 421	249 421
16 Million Dollar Baby	-	247 302	247 302
17 The Incredibles (4)	112 713	127 640	240 353
18 Wallace & Gromit: Curse of the Were-Rabbit	-	219 151	219 151
19 The Aviator	-	212 152	212 152
20 The Interpreter	-	209 847	209 847

(1) Incomplete data for Austria.

(2) 227 057 admissions in Switzerland in 2004.

(3) 10 851 admissions in Switzerland in 2004.

(4) 323 010 admissions in Austria and 260 572 admissions in Switzerland in 2004.

Sources: FAFO/OFS

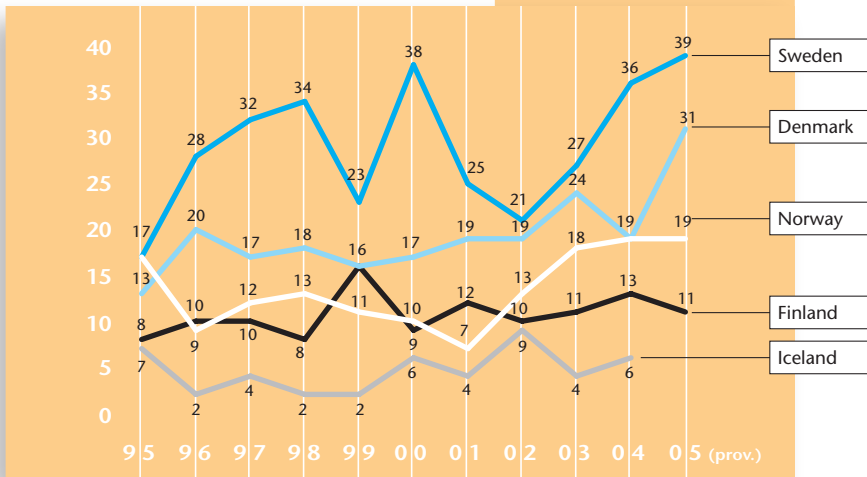
# Nordic countries

	Denmark	Finland	Iceland	Norway	Sweden
Population 2004 (millions)	5,4	5,2	0,3	4,6	9,0
GDP 2004 (USD billions)	241	186	12	250	346
1 USD (April 2006)	6,11 DKK	0,8 EUR	72 ISK	6,5 NOK	7,7 SEK
Admissions 2005 (millions)	12,2	6,0	1,5 <sup>(1)</sup>	11,3	14,6
Admissions/inhabitant 2005	2,2	1,1	4,9 <sup>(1)</sup>	2,5	1,6
Screens 2005	389	340	45 <sup>(1)</sup>	434	1 178 <sup>(1)</sup>
Screens in multiplexes 2004	19,5%	12,6%	–	13,1%	14,1%
Admissions in multiplexes 2004	31,8% <sup>(2)</sup>	42,5%	–	26,1%	–
Share national films 2004	32,3%	15,6%	4,1% <sup>(1)</sup>	12,0%	22,5%

(1) 2004 (2) 2003

## Number of feature films produced in the Nordic countries | 1995-2005

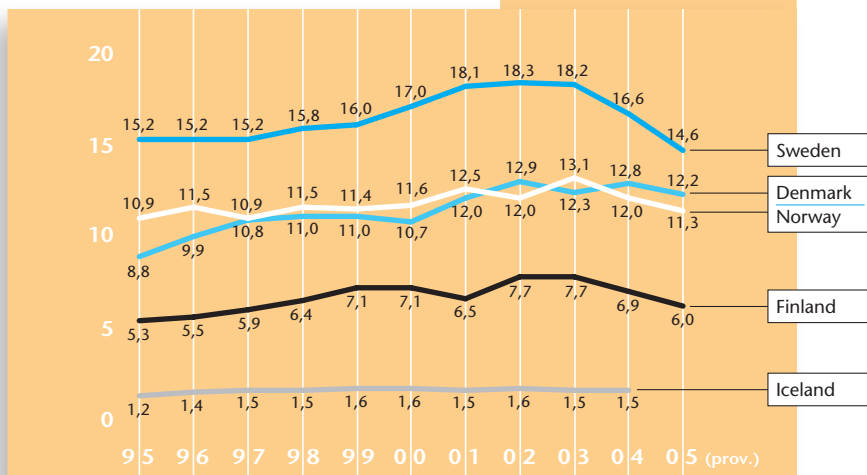
Sources: SFI/DFI/NFF/FFF/HI/OBS



## Admissions in Nordic countries | 1995-2005

In millions.

Sources: SFI/DFI/F&K/NFF/FFF/HI



## Top 20 films by admissions in Denmark, Finland, Norway and Sweden | 2005

Original title	Denmark	Finland <sup>(1)</sup>	Norway <sup>(2)</sup>	Sweden <sup>(2)</sup>	Total
1 Harry Potter and the Goblet of Fire	623 656	360 884	586 759	741 067	2 312 366
2 Star Wars: Episode III - Revenge of the Sith	437 656	269 901	319 774	670 471	1 697 802
3 Madagascar	385 456	229 684	597 785	473 565	1 686 490
4 Charlie and the Chocolate Factory	196 675	115 094	746 832	413 067	1 471 668
5 The Chronicles of Narnia I	180 535	140 112	263 965	414 692	999 304
6 Mr. and Mrs. Smith	205 662	121 464	296 139	345 588	968 853
7 Batman Begins	244 312	137 940	183 629	316 982	882 863
8 Pooh's Heffalump Movie	208 370	159 348	213 726	246 721	828 165
9 War of the Worlds	181 758	121 462	194 352	255 085	752 657
10 Der Untergang (Downfall)	336 063	-	264 431	82 203	682 697
11 King Kong	156 568	94 563	242 256	168 476	661 863
12 Robots	172 196	83 216	203 738	190 147	649 297
13 Kingdom of Heaven	147 368	85 231	146 544	163 687	542 830
14 Wallace & Gromit: Curse of the Were-Rabbit	70 432	153 362	150 416	156 807	531 017
15 Meet the Fockers	134 043	88 678	122 952	178 373	524 046
16 Far til fire gir aldrig op (Father of Four)	495 614	-	-	-	495 614
17 Million Dollar Baby	117 067	84 472	103 917	150 802	456 258
18 Sin City	114 424	99 276	120 527	118 790	453 017
19 Drabet (Manslaughter)	387 315	-	21 225	-	408 540
20 Herbie: Fully Loaded	50 760	-	148 502	207 466	406 728

(1) On the basis of limited data.

(2) On the basis of data on first release films only.

Sources: DFI/FFF/NFF/SFI

## Top 20 Nordic films by admissions in Europe and the United States | 1996-2005

Original title	Country of origin	Director	Admissions EUR + US <sup>(1)</sup>
1 Dancer in the Dark (2)	DK/FR/SE/DE/...	Lars von Trier	4 344 233
2 Breaking the Waves	DK/SE/FR/NL/...	Lars von Trier	3 850 212
3 Italiensk for begyndere	DK	Lone Scherfig	2 946 014
4 Festen	DK	Thomas Vinterberg	2 417 629
5 Dogville	DK/FR/SE/NL/...	Lars von Trier	2 385 077
6 Mies vailla menneisyttä	FI/DE/FR	Aki Kaurismäki	2 122 047
7 Hjælp, jeg er en fisk	DK/DE/IE	S. Fjeldmark, M. Hegner	2 122 014
8 Pettson och Findus - katten och gubbens år	SE/DE	Albert Hanan Kaminski	1 651 886
9 Tillsammans (2)	SE/DK/IT	Lukas Moodysson	1 592 288
10 Pippi Långstrump	SE/DE/CA	Michael Schaack, Bill Giggie	1 468 775
11 Fucking Åmål	SE	Lukas Moodysson	1 284 275
12 Elling	NO	Petter Næss	1 028 540
13 Pettson och Findus - Kattonauten	SE/DE	Albert Hanan Kaminski	990 483
14 Pippi i Söderhavet	SE/DE	Paul Riley	831 826
15 Idioterne	DK	Lars von Trier	716 378
16 Mifunes sidste Sang (2)	DK/SE	Søren Kragh-Jacobsen	703 614
17 Jalla! Jalla!	SE	Josef Fares	695 112
18 Kopps	SE/DK	Josef Fares	672 330
19 Olsen-bandens sidste stik	DK	T. Hedegaard, M. Arnfred	565 067
20 Trolösa	SE/IT/DE/NO	Liv Ullmann	534 334

(1) Admissions on the national market have been excluded. 2005 admissions are provisional.

(2) Admissions total has been revised downwards on the basis of definitive admissions data for France.

Source: OBS/LUMIERE

# Central and South-Eastern Europe

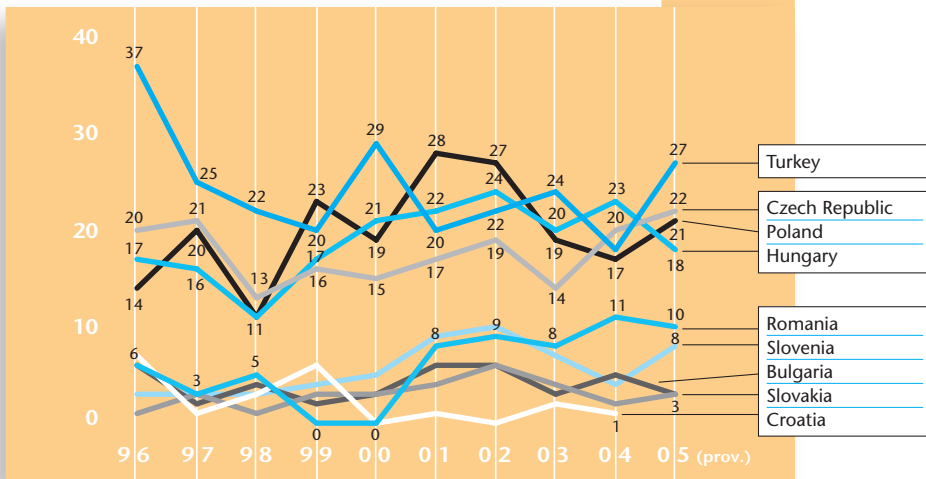
	Bulgaria	Croatia	Czech Republic	Hungary	Poland	Romania	Slovakia	Slovenia	Turkey
Population 2004 (millions)	7,8	4,5	10,2	10,1	38,6	21,8	5,4	2,0	72,2
GDP 2004 (USD billions)	24	34	107	100	242	73	41	32	299
Admissions 2005 (millions)	2,4	3,0 <sup>(1)</sup>	9,5	12,1	23,6	2,8	2,2	2,4	27,3
Admissions/inhab. 2005	0,3	0,7 <sup>(1)</sup>	0,9	1,2	0,6	0,1	0,4	1,2	0,4
Screens 2005	97	131 <sup>(1)</sup>	765 <sup>(1)</sup>	485	870 <sup>(1)</sup>	120	245	106	1 269

(1) 2004

Source: OBS

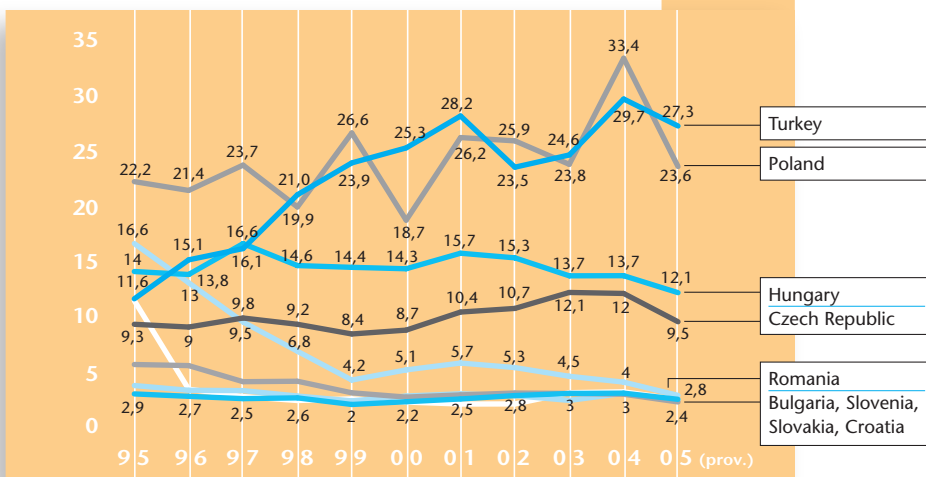
## Number of feature films produced in Central and South-Eastern Europe | 1996-2005

Source: OBS



## Cinema attendance in Central and South-Eastern Europe | 1995-2005

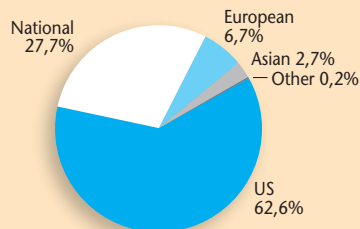
Source: OBS



# Russian Federation

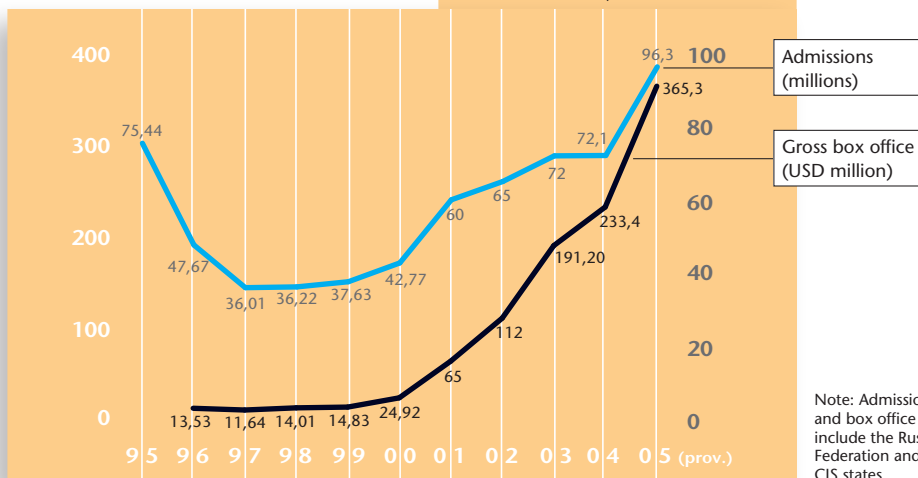
Population 2004	143,9 million
1 USD	27,70 RUB (April 2006)
Admissions 2005	<b>96,3 million</b>
Average admissions/inhab. 2005	0,67
Average urban ticket price 2005	3,8 USD <b>est</b>
National films produced	86
Modern urban cinemas 2005	545
Modern screens 2005	1 001

## Market shares 2005 est



## Admissions and gross box office in the Russian Federation | 1995-2005

Sources: Double-D/Russian FilmBusiness



Note: Admissions and box office totals include the Russian Federation and other CIS states.

## Top 20 films by box office receipts in the Russian Federation and C.I.S. | 2005

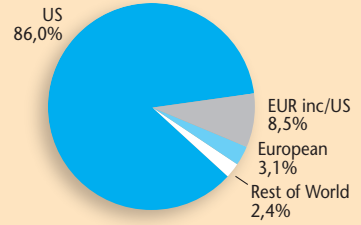
Original title	Distributor	Box Office in USD
1 9-ya rota (Company 9)	Gemini	25 603 000
2 Turetski gambit (Turkish Gambit)	Gemini	19 221 000
3 War of the Worlds	UIP	14 858 000
4 Mr. & Mrs. Smith	Central Partnership	10 103 000
5 Star Wars Episode III: Revenge of the Sith	Gemini	9 404 000
6 King Kong	UIP	8 766 000
7 Madagascar	UIP	8 575 000
8 Boy s tenju (Shadow Boxing)	Central Partnership	8 212 000
9 Statski Sovetnik (The State Councillor)	Caro Premier	8 158 000
10 Muzhskoy sezon... (The Men Season. Velvet Revolution)	Caro Premier	7 187 000
11 Kingdom of Heaven	Gemini	6 455 000
12 Meet the Fockers	UIP	6 387 000
13 National Treasure	Cascade	6 012 000
14 Ocean's Twelve	Caro Premier	4 707 000
15 Lichnyy nomer (Countdown)	Gemini	4 622 000
16 Zhmurki (Blind Man's Bluff)	Nashe Kino	4 544 000
17 Hitch	Cascade	4 305 000
18 Constantine	Caro Premier	4 300 000
19 The Ring 2	UIP	4 238 000
20 The Incredibles	Cascade	4 040 000

Source: Double D - Russian FilmBusiness

# United States

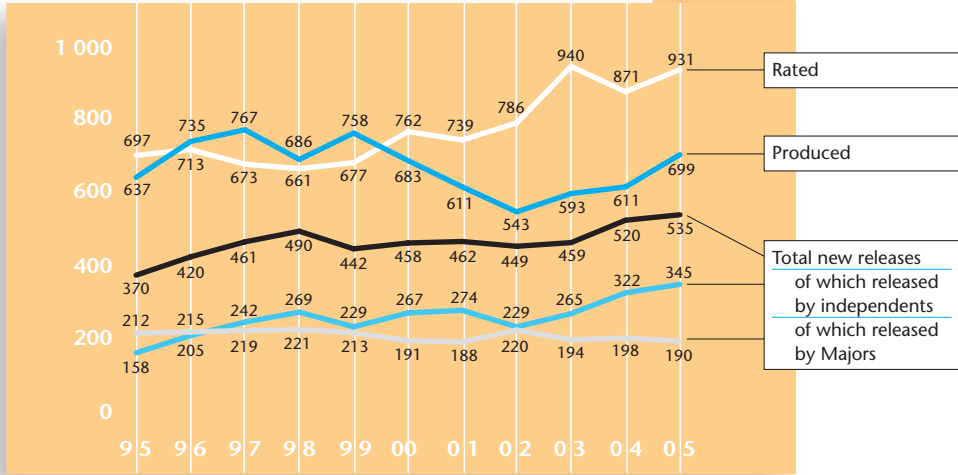
Population 2004	295 million
GDP 2004	11 734 billion USD
1 USD	0,82 EUR (March 2006)
Admissions 2005	1 403 million
Average admissions/inhab. 2005	4,7
Average ticket price 2005	6,41 USD
Screens 2005	38 852
- Indoor	38 143 (98,2%)
- Drive-in	709 (1,8%)

## Market shares 2005



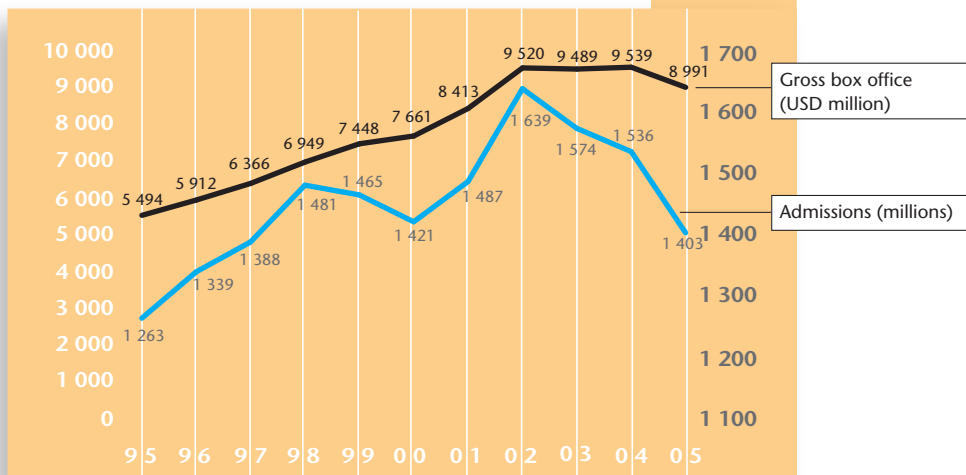
## Number of films produced and new releases in the United States | 1995-2005

Source: MPAA



## Admissions and gross box office | 1995-2005

Source: MPAA



## Production

The number of films on first release in the United States increased by 15 titles in 2005 to 535 films (520 films in 2004). MPAA companies distributed slightly less titles in 2005 (190) than in 2004 (198), while 345 of the new 2005 titles were distributed by independents. 699 features were produced with the intention of theatrical release in 2005, a 14% increase on the total for 2004 (611).

Average theatrical costs for MPAA member companies remained stable in 2005, shrinking by just 0.6% to 96.2 million USD. Despite a 4% decrease in average negative costs, marketing expenditure, which had fallen in 2004, rose again in 2005 to reach 36.2 million USD. Costs for films produced and marketed by subsidiaries and affiliated studios fell back once more to 38.7 million USD, of which 23.5 million USD (29.0 million in 2004) represents negative cost and 15.2 million marketing expenditure (11.4 million in 2004).

## Distribution

Warner Brothers was the distributor earning top market share on the domestic market in 2005, obtaining 15.7% of total receipts principally due to the success of *Harry Potter*, *Charlie and the Chocolate Factory* and *Batman Begins*. Last year's leader, Sony, dropped back to third place with a share of 11.4%, with *Hitch* and *Fun with Dick and Jane* the best performing titles. Fox, placed 5th in 2004, climbed to second place and a domestic market share of 15.4% in 2005 thanks principally to the final instalment of *Star Wars*, but also to *Mr. & Mrs. Smith* and the *Fantastic Four*. Warner, Fox, Sony and Universal all earned revenues in excess of 1 billion USD at the domestic box office in 2005, only three distributors had passed this milestone in 2004.

North American box office charts were dominated by the fantasy and science fiction genres in 2004 with 6 of the top ten films falling into this category. *Star Wars: Episode III – Revenge of the Sith* was the top ranked film, closely followed by *Harry Potter and the Goblet of Fire* and *War of the Worlds*. In 2005 seven titles grossed more than 200 million USD, two more than in 2004. However the number of titles grossing between 50 and 199 million USD fell back, with 48 titles in this range in 2005, compared to 58 in 2004.

## Exhibition

Total admissions to cinemas in the US in 2005 were 1.4 billion, an 8.7% fall on the 1.54 billion tickets sold in 2004. This represents the lowest level of attendance since 1997 and the third consecutive year in which overall admissions have dropped. Rising ticket prices partially cushioned the effect of shrinking attendance on revenue, with total box office receipts reaching 8.99 billion USD, a 5.7% fall in relation to 2004. Average ticket prices moved ahead by 3.2%, going from 6.21 USD per ticket in 2004 to 6.41 USD per ticket in 2005. The decline in attendance pushed the average admissions per capita under the 5 visits per year mark, to 4.7 visits per person, close to pre-1990 levels.

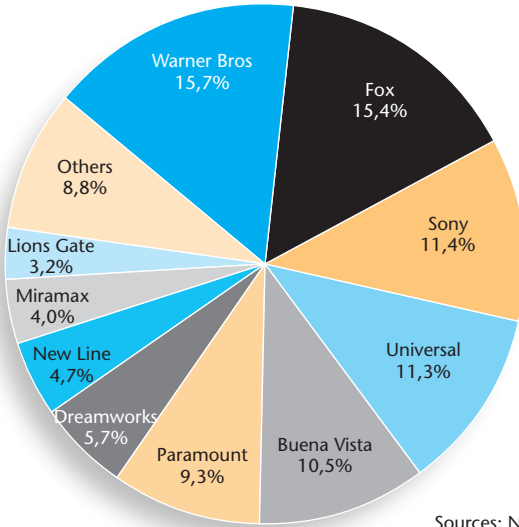
A total of 38 852 screens were in operation in 2005, a 6.2% increase on the figure reported for 2004. The net gain came principally from indoor screens, whose number increased by 2 150. Drive-in screens showed a net gain also, reversing a downward trend. The year-end total of 709 screens represented an 18% gain on the 2004 total of 601 screens.

## Digital cinema

2005 also marked the year in which the industry standards grouping, Digital Cinema Initiative, completed its work and published its Digital Cinema System Specification. These specifications lay out a stable framework for common technical standards to be met in the transition to digital projection, though a number of issues, in particular content protection and cinema compliance certification, still need to be finalised. By end 2005 North America had a total of 324 digital cinema screens, up from just 85 screens in 2004. America's third largest chain, Carmike Cinemas, signed an agreement in December 2005 with Christie/AIX, a company set up for the deployment of digital cinema, to digitise 2 300 of the chain's 2 496 screens by the end of 2007. A smaller regional chain, UltraStar, also announced in early 2006 that it had digitised 100% of its 102 screens, again via the initiative run by Christie/AIX.

Sources: MPAA/Nielson EDI/Variety/Screen Digest

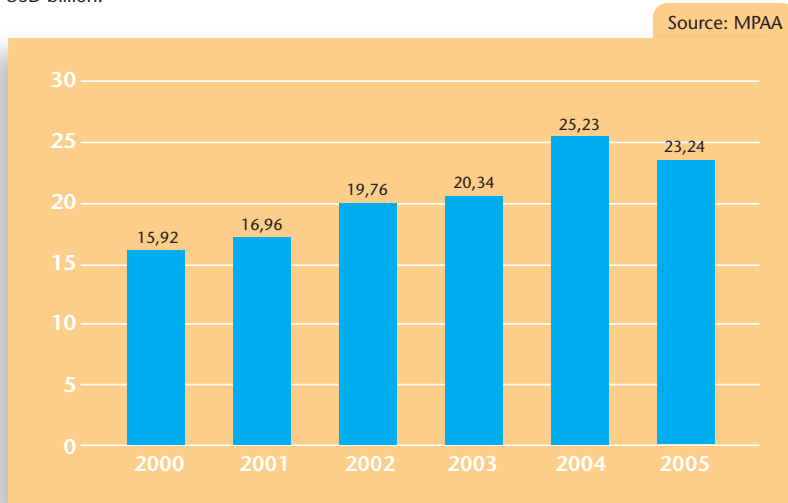
## Distributors' market shares on the North American market | 2005



Sources: Nielsen EDI/Variety

## Worldwide box office revenues | 2005

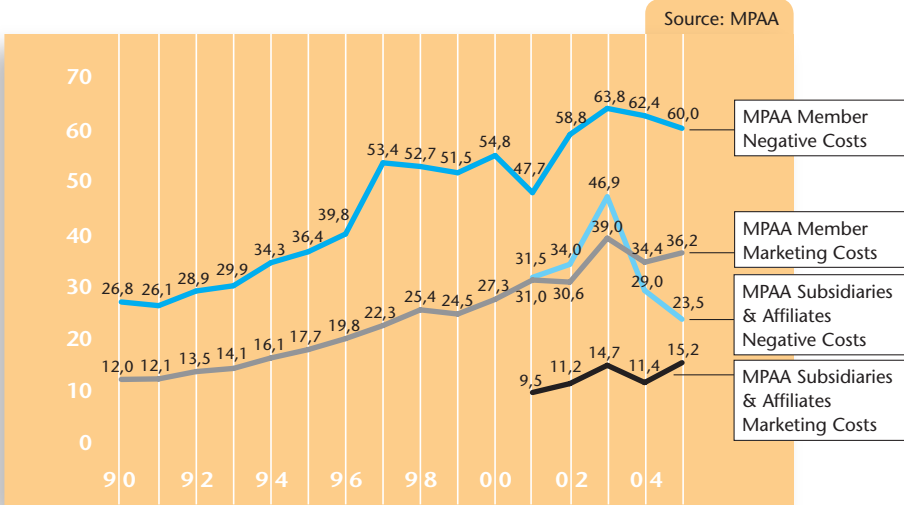
USD billion.





## Average negative and marketing costs of films produced by MPAA members | 1990-2005

USD million.



## Top 20 films by North American box office | 2005

Gross box office United States and Canada, in USD.

	Original title	Country of origin	Distributor	Gross box office
1	Star Wars III - Revenge of the Sith	US	20th Century Fox	380 270 577
2	Harry Potter and the Goblet of Fire (2)	GB inc/US	Warner	277 083 157
3	War of the Worlds	US	Paramount	234 280 354
4	The Chronicles of Narnia (2)	US/NZ inc	Buena Vista	225 703 346
5	Wedding Crashers	US	New Line	209 218 368
6	Charlie and the Chocolate Factory	GB inc/US	Warner	206 459 076
7	Batman Begins	US/GB inc	Warner	205 343 774
8	Madagascar	US	Dreamworks	193 202 933
9	Mr. & Mrs. Smith	US	20th Century Fox	186 336 279
10	Hitch	US	Sony	177 575 142
11	King Kong (2)	US/NZ inc	Universal	174 559 825
12	The Longest Yard	US	Paramount	158 119 460
13	Fantastic Four	US/DE	20th Century Fox	154 696 080
14	Chicken Little (2)	US	Buena Vista	132 265 084
15	Robots	US	20th Century Fox	128 200 012
16	Meet the Fockers (1)	US	Universal	116 738 930
17	The Pacifier	US/CA inc	Buena Vista	113 086 868
18	The 40-Year-Old Virgin	US	Universal	109 289 008
19	Million Dollar Baby (2)	US	Warner	99 390 443
20	Walk the Line (2)	US	20th Century Fox	92 436 258

(1) First release in 2004, 2005 gross only.

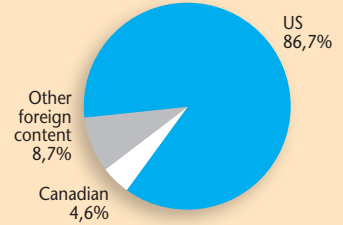
(2) Still on release in 2005.

Source: Variety

# Canada

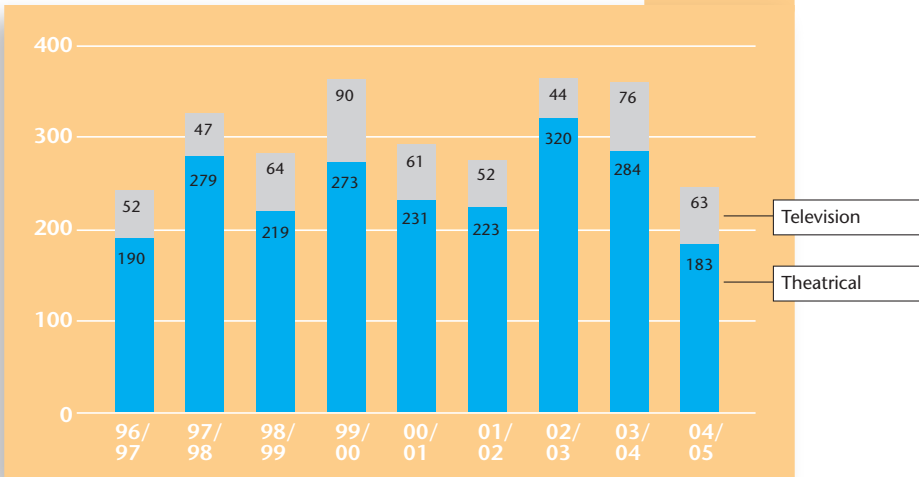
Population 2005	32,4 million
GDP 2004	992 billion USD
1 CAD	0,856 USD (April 2006)
Admissions 2003/2004	119,6 million
Average admissions/inhab. 2003/2004	3,8
Average ticket price 2003/2004	7,45 CAD (= 5,76 USD)
Screens 2003/2004	2 980
- In cinemas	2 896
- Drive-in	84

## Market shares of box office 2004



## Total volume of CAVCO-certified feature film production | 1996-2005

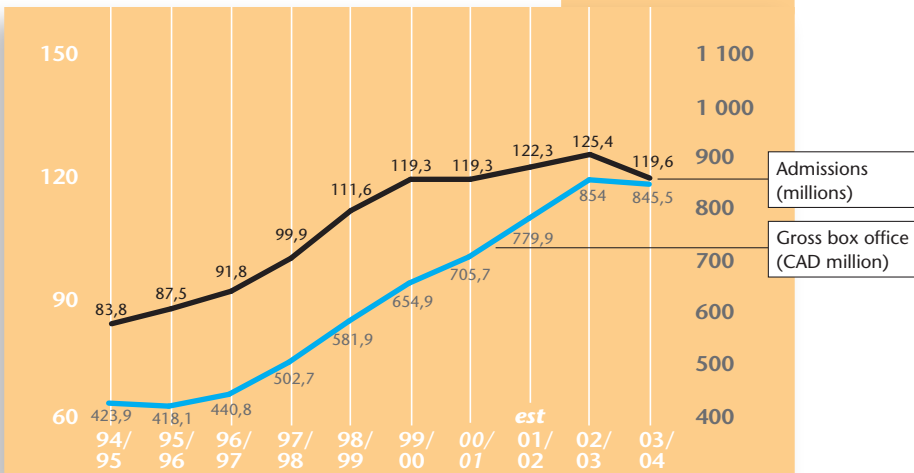
Source: CFTPA



Note: Estimates on the basis of CAVCO data. By release window.

## Admissions and gross box office | 1994-2004

Source: Statistics Canada



## Top 20 films by admissions in Quebec | 2005

	Original title	Country of origin	Year	Director	Admissions Quebec
1	Harry Potter and the Goblet of Fire	GB inc/US	2005	Mike Newell	1 013 625
2	Star Wars: Ep. III - Revenge of the Sith	US	2005	George Lucas	850 738
3	C.R.A.Z.Y.	CA (QC)	2005	Jean-Marc Vallée	781 137
4	Aurore	CA (QC)	2005	Luc Dionne	706 811
5	Horloge biologique	CA (QC)	2005	Ricardo Trogi	543 361
6	War of the Worlds	US	2005	Steven Spielberg	538 552
7	Madagascar	US	2005	Eric Darnell & Tom McGrath	503 776
8	Hitch	US	2005	Andy Tennant	439 048
9	Batman Begins	US/GB inc	2005	Christopher Nolan	422 774
10	Le survenant	CA (QC)	2005	Eric Canuel	415 598
11	Maurice Richard	CA (QC)	2005	Charles Binamé	413 512
12	Les Boys 4	CA (QC)	2005	Georges Mihalka & Louis Saïa	403 590
13	Mr. & Mrs. Smith	US	2004	Doug Liman	389 292
14	Fantastic Four	US/DE	2005	Tim Story	367 594
15	King Kong	US/NZ inc	2005	Peter Jackson	361 612
16	Million Dollar Baby	US	2004	Clint Eastwood	353 403
17	Wedding Crashers	US	2005	David Dobkin	331 415
18	The Aviator (1)	US/JP	2004	Martin Scorsese	317 763
19	Meet the Fockers (2)	US	2004	Jay Roach	295 946
20	Robots	US	2005	Chris Wedge & Carlos Saldanha	273 765

(1) 93 568 admissions in 2004.

(2) 160 138 admissions in 2004.

Source: Observatoire de la culture et des communications du Québec

## Exhibition and distribution

Cinema attendance fell in Canada in 2003/2004 for the first time in a decade, shrinking by 4.6% and bringing to an end a period of continuous upward progression. Box office receipts also fell back, but only by 1%, reflecting a 2% increase in the average ticket price. Statistics Canada, whose Motion Picture Theatres Survey is the source of this data, suggests that the SARS scare during Spring 2003, together with a shortage of blockbusters released during the period in question, may have been factors contributing to this downturn. Over the same period, notes a parallel survey by Statistics Canada, revenue from the wholesaling of DVDs and videocassettes recorded a 12.9% rise, the biggest increase in five years.

On the French-speaking market of Quebec, overall attendance fell back for third year in succession in 2005, with a total of 26.2 million tickets sold (-7%). As in 2004, the drop in admissions did not affect the popularity of Quebec-produced French-language films, whose market share reached a new high of 18.9% and for which 5 million tickets were sold in 2005 (13.8% in 2004). Nostalgic drama *C.R.A.Z.Y.* at number three was the highest placed

of the four local titles appearing in the Quebec Top 10, followed by *Aurore* and *Horloge Biologique* in fourth and fifth places respectively.

## Production

Figures published by the Canadian Film and Television Producers Association (CFTPA) show that the overall value of film and television production in Canada in 2004/2005 amounted to 4.5 billion CAD, a 9% drop in relation to 2003/2004. The decrease was principally due to a 23% drop in the value of foreign location production, with a total volume of 1.46 billion CAD recorded for 2004/2005 (1.9 billion CAD in 2003/2004). Canadian feature film production also experienced a decline, shrinking in value by 31% to reach a total of 253 million CAD (369 million CAD in 2003/2004). This is partly the result of the impact on Canadian co-producers of policy and regulatory changes in Europe, particularly in the United Kingdom, and the resulting decline in treaty co-production activity.

Sources: Statistics Canada/Observatoire de la culture et des communications du Québec/CFTPA

# Latin America

	Argentina	Bolivia	Brazil	Chile	Colombia
Population 2004 (millions)	38,6	9,0	183,9	16,1	44,9
GDP 2004 (USD billions)	153	9	604	94	98
Screens 2004	780 <sup>(1)</sup>	54	2 045 <sup>(1)</sup>	271	406
Admissions 2004 (millions)	34,9 <sup>(1)</sup>	1,5 <sup>(1)</sup>	89,7 <sup>(1)</sup>	9,6 <sup>(1)</sup>	16,2
Average admissions/inhab. 2004	0,9 <sup>(1)</sup>	0,2 <sup>(1)</sup>	0,5 <sup>(1)</sup>	0,6 <sup>(1)</sup>	0,4

	Mexico	Peru	Uruguay	Venezuela
Population 2004 (millions)	105,7	27,6	3,4	26,3
GDP 2004 (USD billions)	676	69	13	109
Screens 2004	3 248	209	85	394 <sup>(1)</sup>
Admissions 2004 (millions)	165,0	11,5	2,41 <sup>(1)</sup>	14,7 <sup>(1)</sup>
Average admissions/inhab. 2004	1,6	0,4	0,7	0,5 <sup>(1)</sup>

(1) 2005

Sources: Filme B/OMA-RECAM/Screen Digest

With the exception of Mexico, all of the Latin American countries for which data is available reported falling cinema admissions in 2005. Among the smaller markets Bolivia, Chile, Uruguay and Venezuela all reported declining attendance, with a particularly sharp drop reported in Venezuela (-22%). Despite shrinking admissions, market share for national films in Venezuela showed a distinct improvement in 2005, reaching 7.7%, up from 1.2% in 2004.

## Argentina

After an impressive 27% increase in 2004, admissions to Argentinian cinemas fell back in 2005. A total of 34.9 million tickets were sold, an 21% drop on the high total of 44.2 million registered in 2004. The 2005 result is nonetheless slightly higher than the total for 2003 (34.7 million). A total of 65 nationally produced films were released and registered a market share of 11.9%, down from the high point of 13.6% in 2004. Comedy *Papá se volvió loco* was the most popular local title with 1.5 million tickets sold, reaching second place in the 2005 ranking. A total of 41 new features were produced during the year, 13 films less than in 2004, bringing to an end three consecutive years of increasing production volume.

## Brazil

Brazil, like Argentina, saw cinema admissions decrease in 2005. Total admissions fell from 114.7 million in 2004 to 89.7 million in 2005, a significant drop of 22%. A total of 47 local films were released, obtaining a market share of 12%,

the second successive year of decline (14% in 2004, 21% in 2003). Two local films sold more than 1 million tickets, whereas in 2004 five domestic titles has passed the one million mark. The most popular film of the year was a locally produced portrait of Brazilian musical duo Zeze Di Camargo and Luciano, *Dois Filhos de Francisco*, which sold more than 5.3 million tickets, ahead of *Harry Potter and the Goblet of Fire* (4.4 million admissions) in second place. Just one other national production, *Xuxa Eo Tesouro da Cidade Perdida*, entered the Top 20 with 1.3 million tickets sold. The national cinema agency ANCINE confirmed in early 2006 that the current screen quota for Brazilian films would be maintained into 2006 – exhibitors had hoped for reduced requirements in line with lower admissions for Brazilian films.

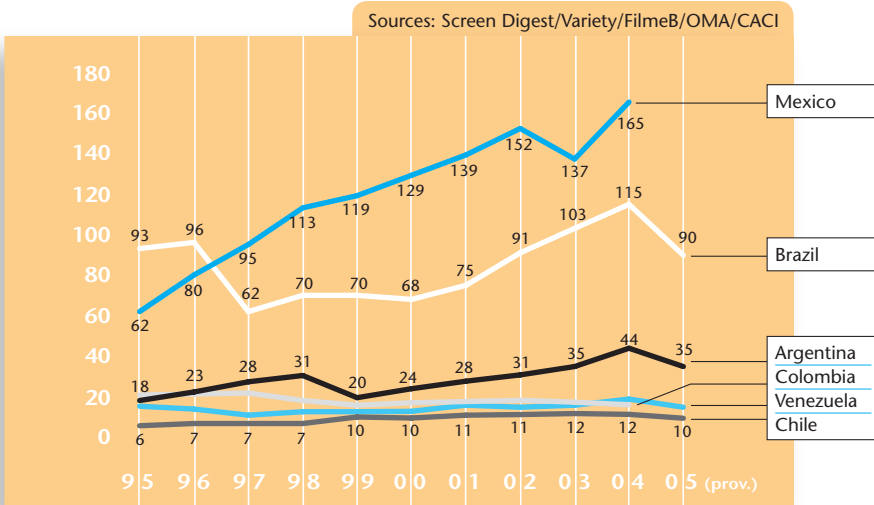
## Mexico

Mexico was one of the rare markets worldwide to escape from the general trend towards shrinking box office. Estimated box office receipts in 2005 reached USD 534 million, an increase of 6% in relation to 2004, when box office rose by 20%. Nonetheless rising ticket prices may be partly responsible for the positive result. A total of 24 locally produced films were released, up from 18 in 2004 but just under the 2003 total of 25. It is hoped that a new tax incentive scheme approved by the Mexican Senate in December 2005 will further encourage local production, by allowing a 10% income tax deduction for investments in the domestic industry in any one year.

Sources: OMA-RECAM/FilmeB/Variety

## Cinema attendance in Latin America | 1995-2005

In millions.



## The top 20 films by admissions in Argentina | 2005

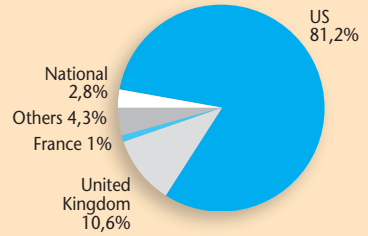
	Original title	Country of origin	Director	Distributor	Admissions
1	Madagascar	US	Darnell & McGrath	UIP	2 027 998
2	Papá se volvió loco	AR	Rodolfo Ledo	Argentina Sono Film	1 479 588
3	War of the Worlds	US	Steven Spielberg	UIP	1 410 089
4	Meet the Fockers	US	Jay Roach	UIP	1 180 687
5	Harry Potter and the Goblet of Fire	GB inc/US	Mike Newell	Warner Bros.	1 011 968
6	Star Wars III: Revenge of the Sith	US	George Lucas	20th Century Fox	899 537
7	Fantastic Four	US/DE	Tim Story	20th Century Fox	843 234
8	The SpongeBob SquarePants Movie	US	Stephen Hillenburg	UIP	702 835
9	Herbie: Fully Loaded	US	Angela Robinson	Buena Vista Int.	700 936
10	Batman Begins	US/GB inc	Christopher Nolan	Warner Bros.	694 831
11	Constantine	US	Francis Lawrence	Warner Bros.	688 949
12	Mr. & Mrs. Smith	US	Doug Liman	20th Century Fox	676 019
13	Ocean's Twelve	US/AU inc	Steven Soderbergh	Warner Bros.	621 076
14	Kingdom of Heaven	GB inc/DE/ES/US	Ridley Scott	20th Century Fox	619 483
15	Charlie and the Chocolate Factory	GB inc/US	Tim Burton	Warner Bros.	586 778
16	Robots	US	Wedge & Saldanha	20th Century Fox	584 841
17	Chicken Little	US	Mark Dindal	Buena Vista Int.	545 707
18	El Aura	AR/ES	Fabián Bielinsky	Buena Vista Int.	531 486
19	Million Dollar Baby	US	Clint Eastwood	Distribution Company	510 590
20	Hide and Seek	US	John Polson	20th Century Fox	508 717

Source: OMA - RECAM

# Australia

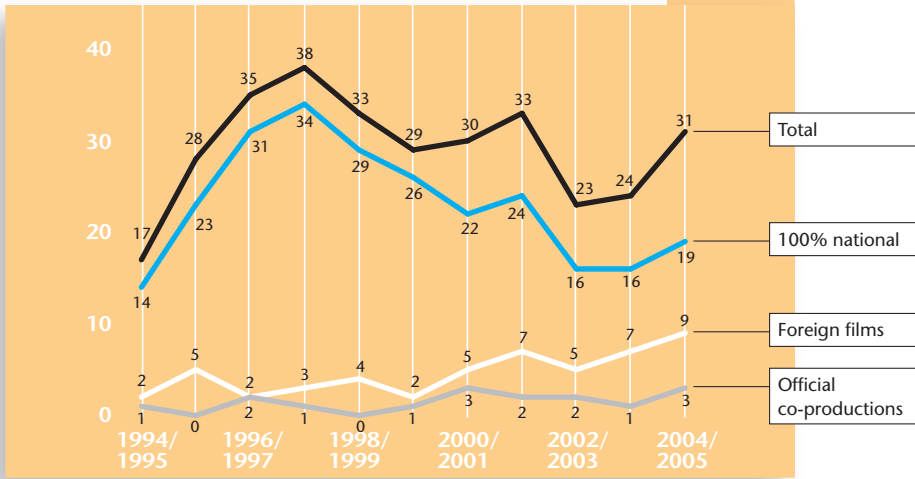
Population 2005	20,52 million
GDP 2004	616 billion USD
1 AUD	0,73 EUR (March 2006)
Admissions 2005	82,2 million
Average admissions/inhab. 2005	4,01
Average ticket price 2005	9,94 AUD (= 7,24 USD)
Screens 2005	1 943

Market shares 2005



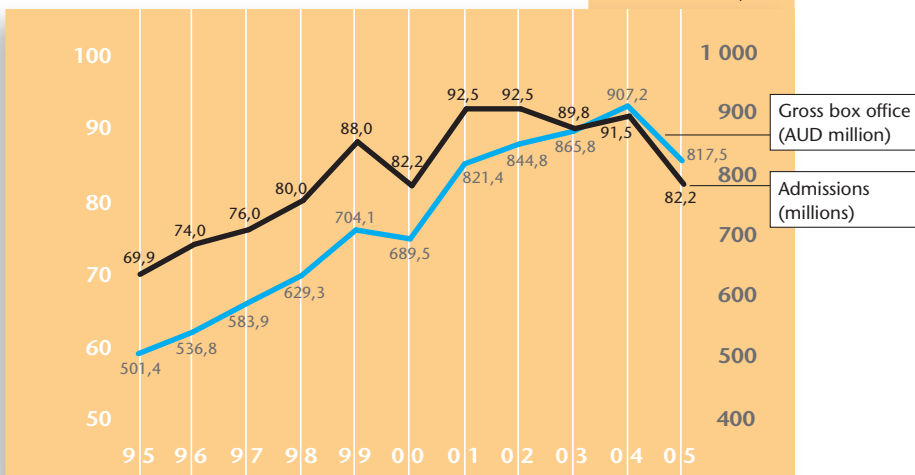
## Number of feature films produced in Australia | 1994-2005

Source: AFC



## Admissions and gross box office | 1995-2005

Sources: MPDAA/AFC



## Top 20 films by gross box office in Australia | 2005

	Original title	Country of origin	Distributor	Gross Box Office (in AUD)
1	Star Wars Episode III: Revenge of the Sith	US	Fox	35 453 636
2	Harry Potter and the Goblet of Fire	GB inc/US	Warner Bros.	30 799 011
3	Madagascar	US	UIP	25 426 110
4	Charlie and the Chocolate Factory	GB inc/US	Roadshow	24 497 897
5	Meet the Fockers	US	UIP	24 100 857
6	War of the Worlds	US	UIP	21 559 982
7	Mr. and Mrs. Smith	US	Fox	20 403 665
8	The Incredibles	US	BVI	16 929 065
9	Wedding Crashers	US	Roadshow	16 774 852
10	Batman Begins	US/GB inc	Warner Bros.	15 770 796
11	King Kong	US/NZ inc	UIP	14 350 969
12	Hitch	US	Sony	14 197 428
13	Chronicles of Narnia I	US/NZ inc	BVI	13 885 549
14	Robots	US	Fox	13 823 183
15	Fantastic Four	US/DE	Fox	12 177 737
16	The Pacifier	US/CA inc	BVI	11 171 666
17	The Longest Yard	US	Sony	10 966 083
18	Wallace & Gromit: Curse of the Were-Rabbit	GB inc/US	UIP	10 732 020
19	The Dukes of Hazzard	US	Roadshow	10 271 430
20	Bewitched	US	Sony	9 840 830

Source: MPDAA

### Exhibition and distribution

In line with the international trend, both gross box office and admissions fell back in Australia in 2005. Cinema attendance totalled 82.2 million tickets sold, down from 91.5 million in 2004. The 10% drop in admissions was reflected in reduced box office takings of 817.5 million AUD, down from 907.2 million AUD in 2004. Box office revenue in Australia has shown almost uninterrupted growth since 1990, with the 2005 downturn only the second negative result during the period in question. The top-ranking film of the year, *Star Wars: Episode III – The Revenge of the Sith*, earned 35.5 million AUD, almost 15 million AUD less than the total for *Shrek 2*, the most popular title in 2004.

Australian films obtained a 2.8% market share of box office in 2005, an increase on the 1.3% reported in 2004 but still the second lowest score of the last 10 years. 27 Australian titles were released during the year. The most successful of these was horror film *Wolf Creek*, earning 5.8 million AUD at the box office and reaching 44th place in the annual ranking. Multiple prize-winning drama *Little Fish* was the second most popular local title, earning 3.7 million AUD. The average budget of an Australian feature film in 2004/2005

(including official co-productions) was 4.8 million AUD and the print and advertising budget for a domestic title on limited release ranged from 0.1 million AUD to 0.5 million AUD, with wider releases benefiting from a P&A budget of 1.0 million AUD or more.

### Production

The number of local feature films produced rose to 19 in 2004/2005 (16 in 2003/2004) but the total value of this production shrank to 61 million AUD from the total of 134 million AUD reported in 2003/2004. Private investors increased their contribution to the 2004/2005 total significantly, while investment by the Australian film and TV industry fell off, with the share of private broadcasters (including pay TV) the lowest for the last nine years. The number of foreign features shooting in Australia in 2004/2005 increased to 9 (up from 6 in 2003/2004), representing a total value of 243 million AUD (249 million AUD in 2003/2004).

Sources: AFC/MPDAA

	Hong Kong	Indonesia	Malaysia	Philippines	Singapore	Taiwan	Thailand
Population 2004 (millions)	7,0	220,8	24,9	81,6	4,3	23,0	63,7
GDP 2004 (USD billions)	163	258	104	85	107	326	163
Admissions 2004 (millions)	16,8 <sup>(1)</sup>	42,0	16,7	63,7	14,8	21,4 <sup>(1)</sup>	35,8
Admissions/inhabitant 2004	2,4 <sup>(1)</sup>	0,2	0,8 <sup>(1)</sup>	0,8	3,5 <sup>(1)</sup>	0,9 <sup>(1)</sup>	0,6

(1) 2005

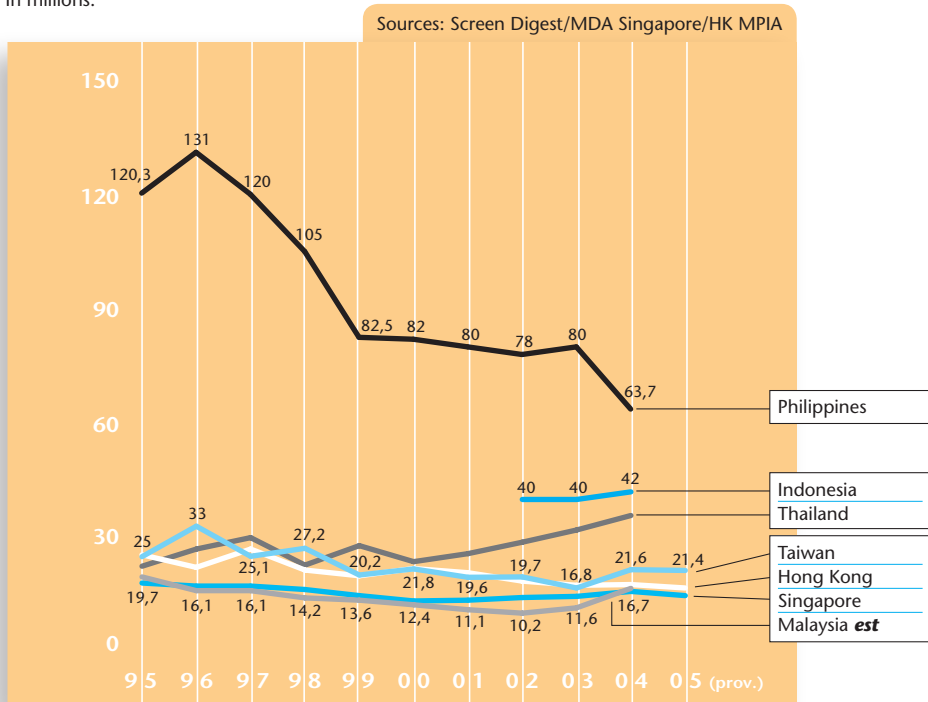
## Cinema screens in Asia | 1997-2005

	1997	1998	1999	2000	2001	2002	2003	2004	2005 <i>prov.</i>
Hong Kong	179	185	189	178	175	184	188	197	200
Indonesia	2 150	2 100	2 100	2 050	2 000	850	850	876	~
Malaysia	309	310	310	310	300	295	203	223	~
Philippines	970	950	950	950	940	900	870	825	~
Singapore	135	147	144	134	145	145	147	147	151
Taiwan	666	672	673	680	690	669	684	694	660
Thailand	360	360	375	390	395	465	495	530	~

Sources: HK Theatres Association/ Screen Digest/Singapore MDA/Institut français de Taipei

## Admissions in Asia | 1995-2005

In millions.





## Top 10 films by box office in Hong Kong | 2005

	International title	Country of origin	Distributor	Box office in million HKD
1	Initial D	HK/CN	Media Asia	37,9
2	Harry Potter and the Goblet of Fire	GB inc/US	Warner Bros.	35,0
3	The Incredibles	US	Intercontinental	33,8
4	King Kong	US/NZ inc	UIP	30,6
5	War of the Worlds	US	UIP	23,7
6	Mr. & Mrs. Smith	US	20th Century Fox	23,3
7	Howl's Moving Castle	JP	Intercontinental	22,5
8	Madagascar	US	UIP	22,0
9	Constantine	US	Warner Bros.	21,0
10	Wait Til You're Older	HK/CN	Media Asia	20,2

Sources: Screen International/MPIA

## Top 10 domestic films by box office in Hong Kong | 2005

	International title	Country of origin	Distributor	Box office in million HKD
1	Initial D	HK/CN	Media Asia	37,9
2	Wait Til You're Older	HK/CN	Media Asia	20,2
3	The Myth	HK/CN	Emperor Motion Pictures	17,1
4	Dragon Reloaded	HK	Mei Ah	15,9
5	Election	HK	China Star	15,9
6	Himalaya Singh	HK/CN	China Star	15,6
7	Perhaps Love	HK/CN/US	Applause Pictures	13,3
8	Drink, Drank, Drunk	HK/CN	Film Unlimited Prodns.	12,0
9	All About Love	HK/CN	Focus Films	11,7
10	House of Fury	HK/CN	Emperor Motion Pictures	10,9

Sources: Screen International/MPIA

## Top 10 films by box office in Singapore | 2005

	International title	Country of origin	Distributor	Box office in million USD <sup>(1)</sup>
1	Harry Potter and the Goblet of Fire	GB inc/US	Warner Bros	5,8
2	King Kong	US/NZ inc	UIP	4,8
3	Star Wars III: Revenge of the Sith	US	20th Century Fox	4,1
4	The Chronicles of Narnia I	US/NZ inc	Buena Vista Int.	4,1
5	Madagascar	US	UIP	3,6
6	War of the Worlds	US	UIP	3,2
7	Fantastic Four	US/DE	20th Century Fox	3,0
8	Batman Begins	US/GB inc	Warner Bros	2,8
9	Constantine	US	Golden Village	2,8
10	Mr. & Mrs. Smith	US	20th Century Fox	2,6

(1) Estimated box office at 31 December 2005.

Source: Screen International

## Top 5 domestic films by box office in Taiwan | 2005 <sup>(1)</sup>

	International title	Country of origin	Distributor	Box office in million USD
1	The Wayward Cloud	TW/FR	CMC Entertainment	0,31
2	The Heirloom	TW/FR	Buena Vista Int.	0,26
3	Fireball	TW/CN	A+ Pictures	0,17
4	Let It Be	TW	Cimage Taiwan	0,13
5	Jump! Boys	TW	JumpBoys Films	0,08

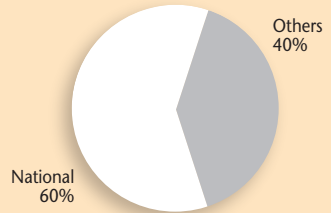
(1) Based on results in Taipei only.

Source: Screen International

# People's Republic of China

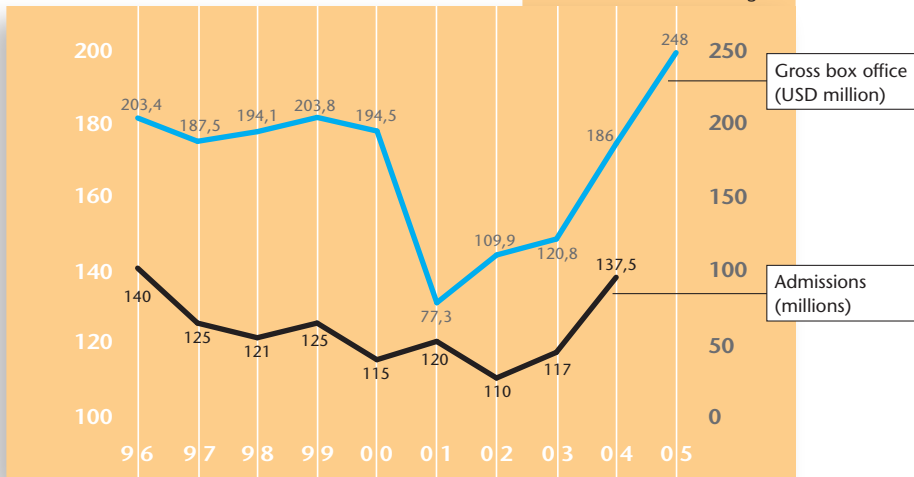
Population 2005	1 308 million
GDP 2004	1 649 billion USD
1 USD	8,03 CNY (March 2006)
Admissions 2004 <b>est</b>	138 million
Average admissions/inhab. 2004	0,10
Average urban ticket price 2004	20 CNY (= 2,40 USD)
Screens 2004	38 496
Modern urban screens 2004	2 396

## Market shares 2005 est



## Admissions and gross box office | 1996-2005

Sources: SARFT/Screen Digest



## Distribution

Chinese box office receipts continued to grow rapidly in 2005, reaching an estimated 2 billion yuan (248 million USD), a 30% increase on the 1.57 billion yuan (186 million USD), registered in 2004. Six of the top ten films were local productions and overall market share for Chinese films is estimated at 60% (55% in 2004). The highest earning film was Chen Kaige's fantasy epic *The Promise*, which earned receipts of 146 million yuan, significantly ahead of its nearest rival *Harry Potter and the Goblet of Fire* with box office earnings of 93 million yuan. Other local films featuring in the list included Jackie Chan vehicle *The Myth*, Tsui Hark's *Seven Swords* and contemporary car race drama *Initial D*. Though foreign imports destined for revenue-sharing distribution are limited to 20 per year, further titles may be imported on a flat-fee basis. As a result an estimated total of 50 foreign films were screened in mainland China in 2005.

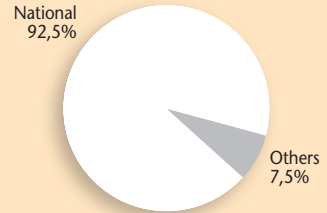
## Production and exhibition

Film production surged ahead once more in China, with a total of 260 features made during 2005, a 23% increase on 2004. 65 films out of the total were made by state-owned film studios, whilst 96 were made by private or non-governmental studios. 62 films were made as co-productions between state-owned and private studios and a further 37 were co-productions between state-owned, private and foreign studios. Of the total of 260, 52 were shot in a digital format. China was the world's leading market in terms of the proportion of films released digitally in 2005, with 29 digital cinema releases out of a total of 120, of which 18 were locally produced titles. Screen numbers were also on the rise, with a total of 55 new cinemas opening during 2005, principally by cinema chains that have become a key element in market expansion.

Sources: SARFT/China Daily/Screen Digest /Variety

Population 2004	1 087 million
GDP 2004	685 billion USD
1 USD	44,4 INR (March 2006)
Admissions 2004 <b>est</b>	3 591 million
Average admissions/inhab. 2004	3,3
Average ticket price 2004	8,91 INR (= 0,20 USD)
Screens 2004 <b>est</b>	10 500
Box office share of multiplexes 2005	40,0%

## Market shares 2004 est



## Top 20 films by box office in India | 2005

Title	Country of origin <sup>(2)</sup>	Year	Director	Box office in INR crore <sup>(3)</sup>
1 Chandramukhi	IN (Tamil)	2005	V.P. Vasu	60,00 <sup>(4)</sup>
2 Anniyan	IN (Tamil)	2005	S. Shankar	57,00 <sup>(4)</sup>
3 Bunty aur Babli	IN (Hindi)	2005	Shaad Ali	43,56
4 No Entry	IN (Hindi)	2005	Anees Bazmee	41,97
5 Black	IN (Hindi)	2005	Sanjay Leela Bhansali	31,95
6 Sarkar	IN (Hindi)	2005	Ram Gopal Verma	29,30
7 Salaam Namaste	IN (Hindi)	2005	Siddarth Anand	29,24
8 Mangal Pandey: The Rising	IN (Hindi)	2005	Ketan Mehta	29,17
9 Garam Masala	IN (Hindi)	2005	Priyadarshan	26,91
10 Chatrapati	IN (Telugu)	2005	S.S. Rajamouli	25,00 <sup>(4)</sup>
11 Waqt	IN (Hindi)	2005	Vipul Shah	24,06
12 Maine Pyar Kyun Kiya	IN (Hindi)	2005	David Dhawan	21,75
13 Dus	IN (Hindi)	2005	Anubhav Sinda	21,35
14 Parineeta	IN (Hindi)	2005	Pradeep Sankar	19,72
15 Kaal	IN (Hindi)	2005	Soham Shah	19,23
16 Sasura Bada Paisewala	IN (Bhojpur)	2004	Unknown	17,00 <sup>(4)</sup>
17 Aphanar (1)	IN (Hindi)	2005	Prakash Jha	16,20
18 Bluffmaster (1)	IN (Hindi)	2005	Roha Sippy	15,89
19 Kya Kool Hai Hum	IN (Hindi)	2005	Sangeeth Sivan	15,87
20 Lucky - No Time for Love	IN (Hindi)	2005	R. Rao & V. Sapru	15,01

(1) Still on release in 2006. (2) In brackets - original language version. (3) 1 crore = 10 million INR, adjusted all-India net. (4) Estimated gross. Source: IBOS Network & European Audiovisual Observatory

## Exhibition

Total 2004 cinema admissions in India were just under 3.6 billion, placing the sub-continent in first place worldwide in terms of attendance in a single market. Ticket prices are amongst the lowest in the world, however, at an average of around 9 rupees (0.20 USD), which means proportionately lower box office returns – 32 billion rupees in 2004 (707 million USD). First estimates for 2005 indicate that box office revenue increased by around 17% compared to 2004. The increase in the number of multiplex cinemas is certainly partly responsible for this growth, as ticket prices in urban complexes are significantly higher than those practised in traditional halls. Screen numbers in India generally have been falling (from 11 000 in 2003 to around 10 500 in 2004) as the number of older halls closing outweighs inaugurations of more modern screens.

## Production

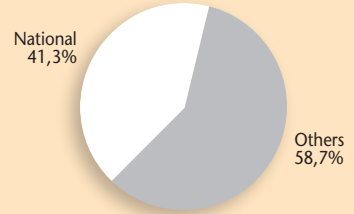
In terms of the number of films produced, the Indian industry is probably the world's most prolific, with a total of 934 Indian features certified for exhibition by the Central Board of Film Certification in 2004. 244 films out of this total were Hindi-language films, but a total of 404 films were certified in three Southern Indian languages: Telugu (203 films), Malayalam (71 films) and Tamil (130 films). Two productions in the Tamil language were among the highest earning films of the year: the comedy *Chandramukhi* featuring local superstar Rajnikanth, and action film *Anniyan*.

Sources: IBOS Network/  
Screen Digest/Screen International

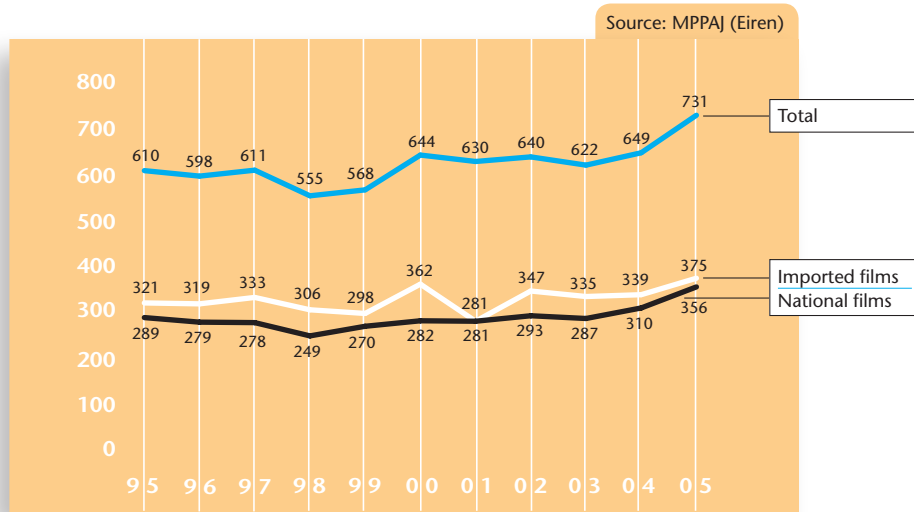
# Japan

Population 2005	127,7 million
GDP 2004	4 669 billion USD
1 USD	116,2 JPY (March 2006)
Admissions 2005	160,5 million
Average admissions/inhab. 2005	1,26
Average ticket price 2005	1 235 (= 10,6 USD)
Screens 2005	2 926
Screens in complexes 2005	1 954

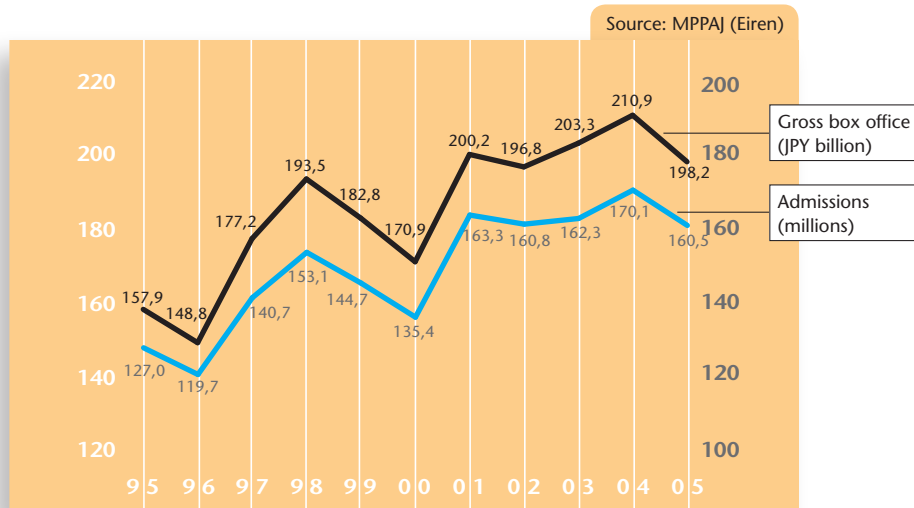
## Market shares 2005



## Number of films released in Japan | 1995-2005



## Admissions and gross box office | 1995-2005



## Top 20 films by gross box office in Japan | 2005

JPY billion.

	Title	Country of origin	Distributor	Gross box office est
1	Hauru no ugoku shiro (Howl's Moving Castle)	JP	Toho	19,60
2	Harry Potter and the Goblet of Fire	GB inc/US	Warner Bros.	11,50
3	Star Wars Episode III: Revenge of the Sith	US	Fox	9,17
4	War of the Worlds	US	UIP	6,00
5	Charlie and the Chocolate Factory	GB inc/US	Warner Bros.	5,35
6	The Incredibles	US	Buena Vista	5,26
7	Pikachu the Movie: Mew to Hadounoyusha Lucario	JP	Toho	4,30
8	The Phantom of the Opera	US/GB inc	Gaga/Usen	4,20
9	Negotiator: Mashita Masayoshi	JP	Toho	4,20
10	The Terminal	US	UIP	4,15
11	Nana	JP	Toho	4,03
12	Muroi shinji (The Suspect)	JP	Toho	3,83
13	Train Man	JP	Toho	3,70
14	Ocean's Twelve	US/AU inc	Warner Bros.	3,60
15	Always - Sanhome no Yuhi (Sunset on Third Street)	JP	Toho	3,23
16	Nae meori sogui jiugae (A Moment to Remember)	KR	Gaga/Usen	3,00
17	Wae-chool (April Snow)	KR	UIP	2,75
18	Constantin	US	Warner Bros.	2,72
19	Kita no zeronen (Year One in the North)	JP	Toei	2,70
20	Shall We Dance?	US	Gaga/Usen	2,50

Source: MPPA (Eiren)

### Production and distribution

A total of 731 films were released in the Japanese market in 2005, the highest number of new releases since 1990. 356 of these films were locally produced, 46 films more than in 2004, and the highest figure since 1992. The remaining 375 films were foreign imports, an increase of 36 films in relation to the total for 2004 (649 films). Japanese films earned a 41.3% share of gross box office, the best score since the 41.5% registered in 1997.

Animation film *Hauru no ugoku shiro* (*Howl's Moving Castle*), released in November 2004, was the most popular film in 2005 on the basis of a cumulative gross of 19.6 billion yen, with 2005 year-end release *Harry Potter and the Goblet of Fire* in second place with a total of 11.5 billion yen. The most successful 2005 local release was the latest in the Pokémon adventures *Pikachu the Movie: Mew to Hadounoyusha Lucario* in seventh place. Six further Japanese titles figured in the top 20 including *Negotiator*, latest instalment of the *Bayside Shakedown* series and the award-winning *Always - Sanhome no Yuhi* (*Sunset on Third Street*). The increasing success of South Korean production was witnessed by

the appearance of two melodramatic titles *Nae meori sogui jiugae* (*A Moment to Remember*) and *Wae-chool* (*April Snow*) at sixteenth and seventeenth places respectively.

2005 also witnessed a number of changes in the national distribution landscape, as two of the largest independent distributors, Gaga Communications and Nippon Herald Films, were taken over following financial problems.

### Exhibition

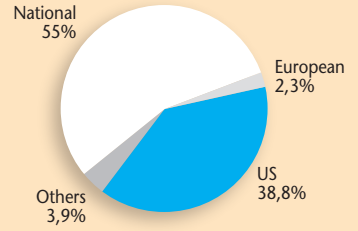
Total admissions to cinemas in Japan fell by 5.7%, to 160.5 million, while box office receipts fell by back 6%, from 210.9 billion yen in 2004 to 198.2 billion in 2005. Average ticket prices (before tax) slipped back slightly, from 1 240 yen in 2004 to 1 235 yen in 2005, but Japanese ticket prices remain among the highest worldwide. Screen numbers continued to rise, passing from 2 825 in 2004 to 2 926 in 2005 (+ 101 screens) with 67% of screens situated in cinema complexes. 51 screens were equipped with high-end digital projection systems in mid-2005.

Sources: EIREN/Screen Digest/Informa Media

# South Korea

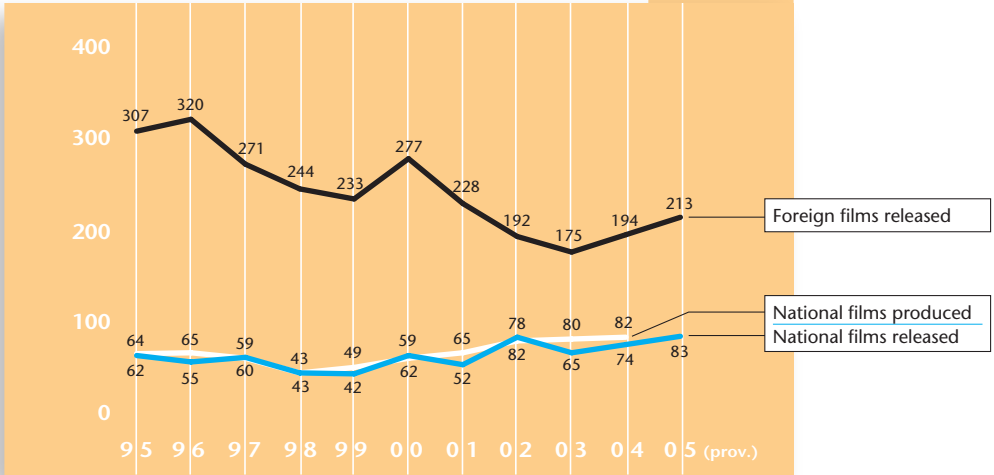
Population 2005	48,3 million
GDP 2004	680 billion USD
1 USD	988 KRW (March 2006)
Admissions 2005 <b>est</b>	143,0 million
Average admissions/inhab. 2005 <b>est</b>	2,95
Average ticket price 2004	6 287 KRW (= 6,52 USD)
Screens 2005	1 634

## Market shares 2005 (Seoul)



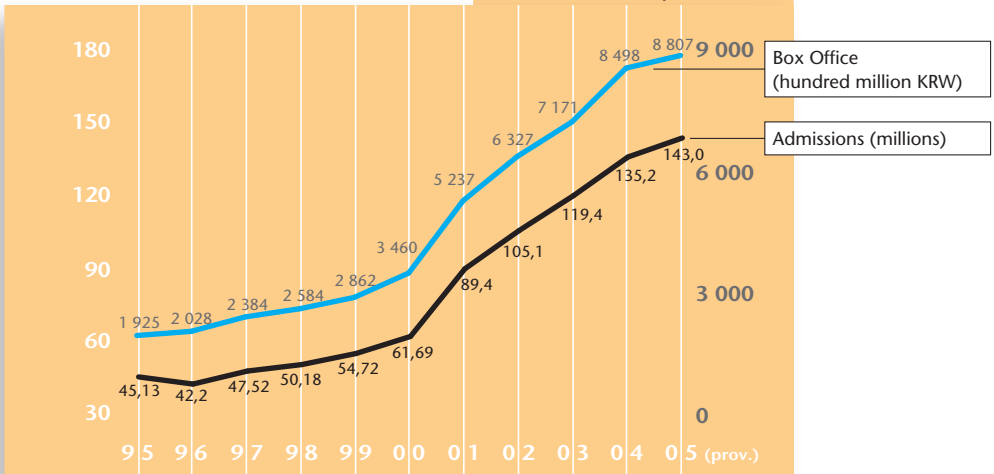
## Number of feature films produced and imported | 1995-2005

Source: KOFIC



## Admissions and gross box office | 1995-2005

Sources: KOFIC/Variety (GBO 2005)



## Top 20 films by admissions in South Korea | 2005

Provisional ranking.

	International title	Country of origin	Year	Director	Admissions
1	Welcome to Dongmakgol	KR	2005	Park Gwang-hyun	8 008 622
2	Marrying the Mafia 2: Enemy-in-Law	KR	2005	Jeong Yong-ki	5 635 266
3	Marathon	KR	2005	Jeong Young-chul	5 148 022
4	Another Public Enemy	KR	2005	Kang Woo-suk	3 911 356
5	Typhoon	KR	2005	Kwak Kyung-taek	3 723 752
6	Sympathy for Lady Vengeance	KR	2005	Park Chan-wook	3 650 000
7	Mr. & Mrs. Smith	US	2005	Doug Liman	3 546 900
8	Harry Potter and the Goblet of Fire	GB inc/US	2005	Mike Newell	3 473 400
9	The Island	US	2005	Michael Bay	3 433 900
10	War of the Worlds	US	2005	Steven Spielberg	3 223 000
11	Mapado	KR	2005	Choo Chang-min	3 090 467
12	You Are My Sunshine	KR	2005	Park Jin-pyo	3 051 134
13	Howl's Moving Castle (1)	JP	2004	Hayao Miyazaki	3 015 165
14	King Kong	US/NZ inc	2005	Peter Jackson	2 913 000
15	All for Love	KR	2005	Min Kyu-dong	2 533 103
16	Murder, Take One	KR	2005	Jang Jin	2 475 291
17	When Romance Meets Destiny	US	2005	Kim Hyun-seok	2 475 291
18	Blood Rain	KR	2005	Kim Dae-seung	2 430 200
19	Innocent steps	KR	2005	Park Young-hoon	2 274 995
20	The Phantom of the Opera (1)	US/GB inc	2005	Joel Schumacher	2 006 880

(1) Cumulative admissions since December 2004.

Sources: KOFIC/Distributors

### Exhibition & distribution

South Korea was one of the few markets to register positive results in 2005, though growth showed signs of a significant slowing down. Admissions rose to an estimated 143 million, a 5.8% increase on 2004. As elsewhere results for locally produced and for imported films in the first half of the year were disappointing and only a significant improvement in the second half allowed the year to end on a positive note. Nevertheless the 5.8% increase in attendance brings to an end the period of double-digit growth in admissions observed since 2000. Market share for national films remained stable in relation to 2004, at an estimated 59%. As in 2004 the combined market share of Korean and American films in Seoul reached 93.8%, leaving scant room for films of other origins.

Seven of the Top 10 films in 2005 were Korean: the most popular film was drama *Welcome to Dongmakgol* which sold more than 8 million tickets nationwide, ahead of sequel *Marrying the Mafia 2* in second place with 5.6 million admissions. As in 2004 the leading distributor was CJ Entertainment with a market share of 21.9%, though Showbox, in second place with 19.8% of the market, distributed the leading successes

of the year (*Welcome to Dongmakgol*, *Marrying the Mafia 2* and *Marathon*).

In the face of increasing pressure to reach agreement in trade negotiations, the Korean government decided to reduce the 40-year-old screen quota for local films from 146 to 73 screen days per year. At the same time a new support fund designed to further strengthen the local industry was established with a five-year budget of USD 400 million.

### Korean films abroad

Exports of Korean films were worth just under 76 million USD in 2005, a 30% increase on the value for 2004. Exports concentrated more on more on the Asian region, with 79% of the total accounted for by exports to Japan, where 2 Korean films featured in the 2005 Top 20. Whereas in the past completed works and re-make rights were the principle focus for export, increasingly Korean films are pre-sold, occasionally at scenario stage. Asian markets tend to prefer commercial films involving specific star actors or directors, whereas European markets (principally France and Germany) prefer art-house titles.

Sources: KOFIC/Screen Digest

# Africa - Middle East

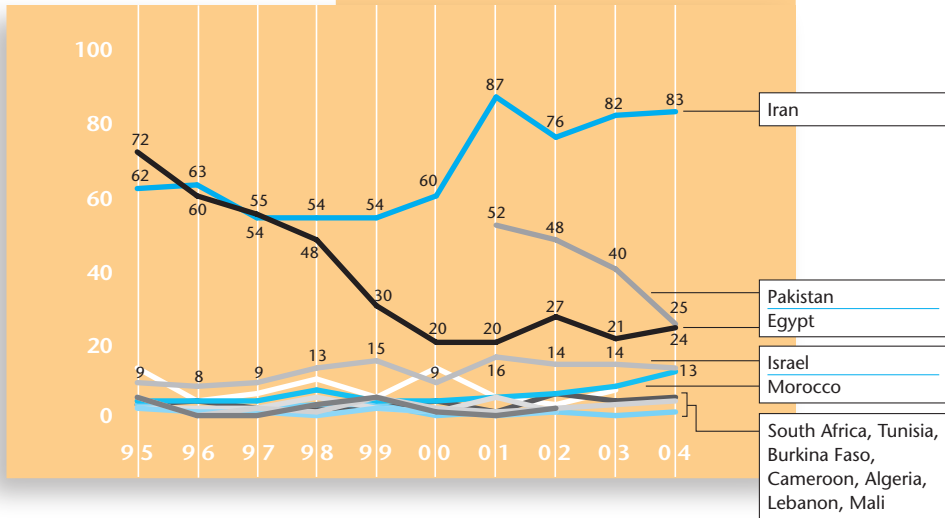
	Bahrain	Burkina Faso	Benin	Egypt	Israel	Iran	Lebanon
Population 2004 (millions)	0,72	12,8	8,2	72,6	6,6	66,8	3,5
GDP 2004 (USD billions)	9,6 <sup>(3)</sup>	5,0	4,1	79,1	117,5	128,6	~
Screens 2004	26	19	7 <sup>(2)</sup>	220	365	261	86
Admissions 2004 (millions)	1,25	1,5 <sup>(1)</sup>	0,06 <sup>(1)</sup>	24,5	10,4	8,0 <sup>(2)</sup>	2,6
Admissions/inhab. 2004 <b>est</b>	1,7	0,1 <sup>(1)</sup>	0,01 <sup>(1)</sup>	0,3	1,6	0,1 <sup>(2)</sup>	~

	Morocco	Mali	Senegal	Tunisia	South Africa	United Arab Emirates
Population 2004 (millions)	31,0	13,1	11,4	10	47,2	4,3
GDP 2004 (USD billions)	43,7 <sup>(3)</sup>	4,8	7,6	28,2	212,8	100 <b>est</b>
Screens 2004	143	11	22 <sup>(2)</sup>	36	776	177
Admissions 2004 (millions)	6,0	~	0,8 <sup>(1)</sup>	~	25,7	4,5
Admissions/inhab. 2004 <b>est</b>	0,2	~	0,1 <sup>(1)</sup>	~	0,5	1,0

(1) 2001 (2) 2002 (3) 2003

## Number of feature films produced in Africa and the Middle East | 1995-2004

Sources: Cahiers du cinéma/SD/DCN (BF)/EFC (EG)/Carthage Film Festival/CNPC(ML)/Farabi FF (IR)



## Top 10 African and Middle Eastern films by admissions in Europe | 1996-2005

Title	Country of origin	Year	Director	Admissions in Europe
1 Safar e Ghandehar	IR/FR	2001	Mohsen Makhmalbaf	1 350 952
2 Hotel Rwanda	ZA/GB/IT/CA/US	2004	Terry George	812 596
3 Al-massir	EG/FR	1997	Youssef Chahine	727 138
4 Va, vis, et deviens	FR/BE/IT/IL	2005	Radu Mihaileanu	601 114
5 Dayereh	IR/IT	2000	Jafar Panahi	572 654
6 Yadon ilaheyya	FR/MA/DE/PS	2001	Elia Suleiman	475 510
7 Kadosh	IL/FR	1999	Amos Gitai	474 838
8 Ta'm e guilass	IR/FR	1997	Abbas Kiarostami	421 560
9 Osama	AF/JP/IE/NL/IR	2003	Siddiq Barmak	411 814
10 Little Senegal	FR/DZ/DE	2001	Rachid Bouchareb	361 324

Note: A number of films majority-financed by a European production company are included on this list because of their African or Middle-Eastern cultural content. Please note that French admissions totals prior to 2004 for some films have been revised.

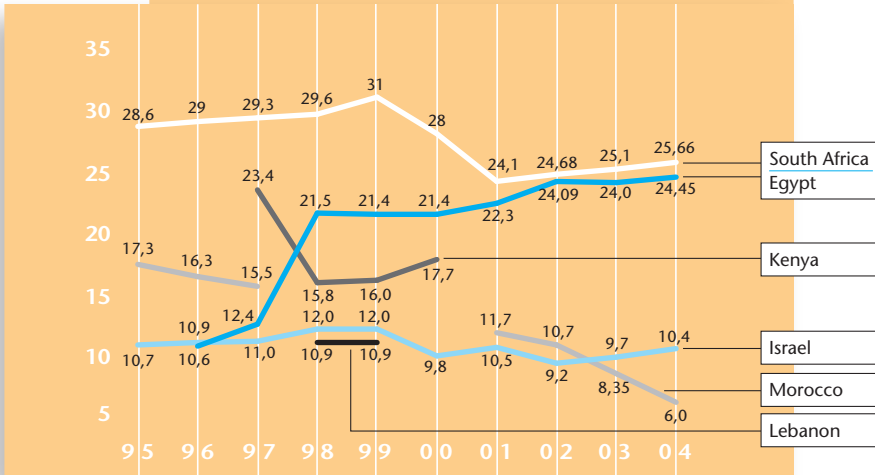
Source: OBS/LUMIERE



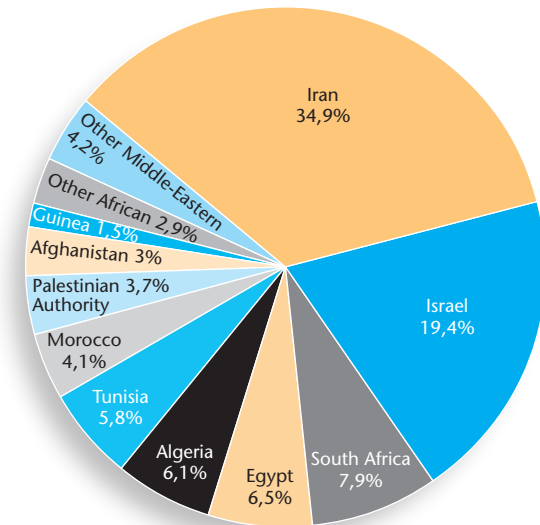
**Admissions in Africa and the Middle East | 1995-2004**

In millions.

Sources: Screen Digest, UNESCO (1995-2001)/Les cahiers du cinéma/CCM



**Breakdown by origin of admissions to African and Middle Eastern films in Europe | 1996-2005**



Note: a number of films majority-financed by a European production company are included in this analysis in order to reflect their African or Middle-Eastern cultural content.

Source: OBS/LUMIERE

## Sources

This brochure, prepared by the European Audiovisual Observatory, has been made possible thanks to the following sources:

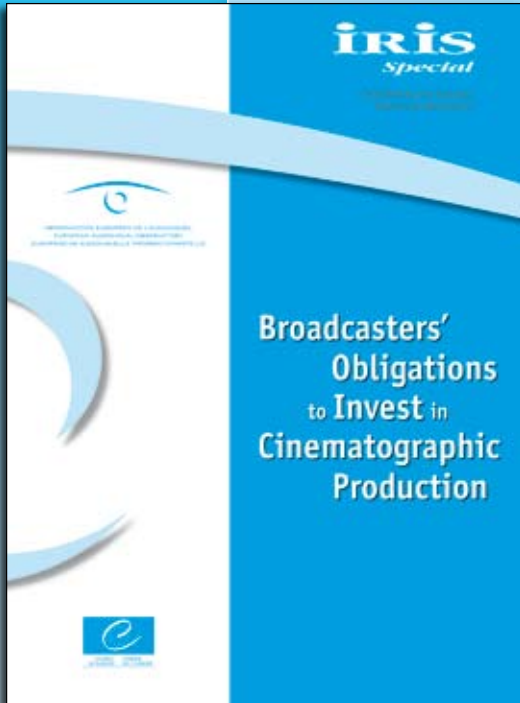
ANICA	<b>IT</b>	<a href="http://www.anica.it">http://www.anica.it</a>
Audiovisual Information Centre	<b>SK</b>	<a href="http://www.aic.sk/">http://www.aic.sk/</a>
Australian Film Commission	<b>AU</b>	<a href="http://www.afc.gov.au/">http://www.afc.gov.au/</a>
CAA	<b>GB/IE</b>	<a href="http://www.carltonscreen.com/htm/research.php">http://www.carltonscreen.com/htm/research.php</a>
Canadian Audio-visual Certification Office	<b>CA</b>	<a href="http://www.pch.gc.ca/progs/ac-ca/progs/bcpac-cavco/index_e.cfm">http://www.pch.gc.ca/progs/ac-ca/progs/bcpac-cavco/index_e.cfm</a>
Central Board of Film Certification	<b>IN</b>	<a href="http://www.cbcfindia.tn.nic.in">http://www.cbcfindia.tn.nic.in</a>
Centrul National al Cinematografie	<b>RO</b>	<a href="http://www.cncinema.abt.ro/index.aspx">http://www.cncinema.abt.ro/index.aspx</a>
Centre national de l'audiovisuel	<b>LU</b>	<a href="http://www.cna.public.lu/">http://www.cna.public.lu/</a>
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FilmeB	<b>BR</b>	<a href="http://www.filmeb.com.br">http://www.filmeb.com.br</a>
<i>Film &amp; Kino</i>	<b>NO</b>	<a href="http://www.filmweb.no/filmogkino/">http://www.filmweb.no/filmogkino/</a>
Filmski Sklad Republike Slovenije	<b>SI</b>	<a href="http://www.film-sklad.si/slo/">http://www.film-sklad.si/slo/</a>
Finnish Film Foundation	<b>FI</b>	<a href="http://www.ses.fi/">http://www.ses.fi/</a>
<i>Le film français</i>	<b>FR</b>	<a href="http://www.lefilmfrançais.com/">http://www.lefilmfrançais.com/</a>
Greek Film Center	<b>GR</b>	<a href="http://www.gfc.gr/">http://www.gfc.gr/</a>
Hagstofa Island	<b>IS</b>	<a href="http://www.static.is">http://www.static.is</a>
IBOS Network	<b>IN</b>	<a href="http://ibosnetwork.com/default.asp">http://ibosnetwork.com/default.asp</a>
ICAA	<b>ES</b>	<a href="http://www.mcu.es/jsp/plantilla_wai.jsp?id=1&amp;area=cine">http://www.mcu.es/jsp/plantilla_wai.jsp?id=1&amp;area=cine</a>
ICAM	<b>PT</b>	<a href="http://www.icam.pt/">http://www.icam.pt/</a>
Institut français de Taipei	<b>TW</b>	<a href="http://www.fi-taipei.org/">http://www.fi-taipei.org/</a>
Korean Film Council	<b>KR</b>	<a href="http://www.koreanfilm.or.kr/">http://www.koreanfilm.or.kr/</a>
Lietuvos Kinas	<b>LT</b>	<a href="http://www.theatre.lt/liet_kinas.php">http://www.theatre.lt/liet_kinas.php</a>
Malta Film Commission	<b>MT</b>	<a href="http://www.mfc.com.mt/home.asp?mainid=6">http://www.mfc.com.mt/home.asp?mainid=6</a>
Media Live	<b>IE</b>	<a href="http://www.medialive.ie/">http://www.medialive.ie/</a>
MEDIA Salles	<b>IT</b>	<a href="http://www.mediasalles.it">http://www.mediasalles.it</a>
Ministry of Culture	<b>CZ</b>	<a href="http://www.mkcr.cz">http://www.mkcr.cz</a>
Ministry of Culture	<b>PL</b>	<a href="http://www.mk.gov.pl/">http://www.mk.gov.pl/</a>
<i>Moniteur du film en Belgique</i>	<b>BE</b>	
MPPAA	<b>US</b>	<a href="http://www.mppaa.org">http://www.mppaa.org</a>
National Film Office	<b>HU</b>	<a href="http://www.nemzetifilmiroda.hu">http://www.nemzetifilmiroda.hu</a>
National Film Center	<b>BG</b>	<a href="http://www.nfc.bg/">http://www.nfc.bg/</a>
National Film Centre	<b>LV</b>	<a href="http://www.nfc.lv">http://www.nfc.lv</a>
Nederlands Fonds voor de Film	<b>NL</b>	<a href="http://www.filmfund.nl/">http://www.filmfund.nl/</a>
NFC (NVB - NVF)	<b>NL</b>	<a href="http://www.nfcstatistiek.nl/">http://www.nfcstatistiek.nl/</a>
Norsk Filmfond (NFF)	<b>NO</b>	<a href="http://www.filmfondet.no/">http://www.filmfondet.no/</a>
Observatoire de la culture du Québec	<b>CA</b>	<a href="http://www.stat.gouv.qc.ca/observatoire/default.htm">http://www.stat.gouv.qc.ca/observatoire/default.htm</a>
Observatorio del Mercosur Audiovisual (OMA)	<b>AR</b>	<a href="http://www.oma.recam.org/">http://www.oma.recam.org/</a>
Office fédéral de la statistique	<b>CH</b>	<a href="http://www.admin.ch/bfs">http://www.admin.ch/bfs</a>
Osservatorio italiano dell'audiovisivo	<b>IT</b>	<a href="http://www.cinecitta.com/holding/iniziativa/iniziativa.asp?id=142">http://www.cinecitta.com/holding/iniziativa/iniziativa.asp?id=142</a>
Procinéma	<b>CH</b>	<a href="http://www.procinema.ch/">http://www.procinema.ch/</a>
<i>Russian FilmBusiness</i>	<b>RU</b>	<a href="http://www.kinobusiness.com/">http://www.kinobusiness.com/</a>
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<i>Screen Digest</i>	<b>GB</b>	<a href="http://www.screendigest.com/">http://www.screendigest.com/</a>
<i>Screen Finance</i>	<b>GB</b>	<a href="http://www.informamedia.com">http://www.informamedia.com</a>
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Slovenian Film Fund	<b>SI</b>	<a href="http://www.film-sklad.si/eng/">http://www.film-sklad.si/eng/</a>
SPIO	<b>DE</b>	<a href="http://www.spio.de/">http://www.spio.de/</a>
Statistique Canada / Statistics Canada	<b>CA</b>	<a href="http://www.statcan.ca/">http://www.statcan.ca/</a>
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Unie Filmowych Distributoru	<b>CZ</b>	<a href="http://www.ufd.cz/">http://www.ufd.cz/</a>
UK Film Council	<b>GB</b>	<a href="http://www.ukfilmcouncil.org.uk/">http://www.ukfilmcouncil.org.uk/</a>
<i>Variety</i>	<b>US</b>	<a href="http://www.variety.com">http://www.variety.com</a>



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