



MARCHÉ DU FILM
FESTIVAL DE CANNES

Focus 2007

World Film Market Trends
Tendances du marché mondial du film



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Tendances du marché mondial du film



OBSERVATOIRE EUROPÉEN DE L'AUDIOVISUEL
EUROPEAN AUDIOVISUAL OBSERVATORY
EUROPÄISCHE AUDIOVISUELLE INFORMATIONSTELLE



Marché du Film

Editorial

Alors que le Festival de Cannes fête ses 60 ans, la relation entre cinéma et spectateurs entre dans une nouvelle époque.

La salle de cinéma connaît une nouvelle évolution avec la montée en puissance de la projection numérique et l'arrivée des films en 3D ; le cinéma indépendant se bat pour conserver une place dans ces salles ; le développement d'Internet comme vecteur de promotion et de diffusion est perçu tour à tour comme une menace ou une opportunité pour la diversité.

Plus que jamais Focus est un outil indispensable pour suivre les principaux indicateurs de la production et de la diffusion des films dans le monde.

Focus a vu le jour pour les 50 ans du Festival. Je souhaite que cette collaboration exemplaire avec l'Observatoire Européen de l'Audiovisuel se poursuive pour la prochaine décennie et nous aide à en analyser les enjeux.

Jérôme Paillard
Directeur Délégué

FOCUS 2007 World Film Market Trends, appears for the tenth 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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While the Festival de Cannes is celebrating its sixtieth birthday, relations between cinema and its audiences are entering a new phase.

Theatres are evolving with the increase of digital screenings and now the arrival of films in 3D; independent cinema is fighting to keep its place in these theatres; the development of Internet as a promotional and broadcasting vector is seen as both a threat and an opportunity for diversity.

For this reason Focus is more than ever an essential tool to follow the main indicators of the production and distribution of films around the world.

Focus came into being for the Festival's fiftieth birthday. My wish is that this exemplary collaboration with the European Audiovisual Observatory will continue for the next decade and help us to analyse these new challenges.

Jérôme Paillard
Executive Director

FOCUS 2007, Tendances du marché mondial du film, paraît pour la dixième 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 Etats 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 2007

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A Long Tail for *les marches*?

As the Cannes Festival celebrates its 60th edition, it seems a good moment to raise a delicate question: what opportunities do the members of today's public have to see the films screened at the Festival since 1946? Who can claim today to be able to see the Danish film *De Røde Enge* (The Earth Will Be Red) directed by Bodil Ipsen and Lau Lauritzen, the first Grand Prix mentioned on the 1946 honours list or the Portuguese *Juventude Em Marcha* (Colossal Youth), one of the films included in the 2006 selection whose conditions of distribution have since been a bone of fierce contention in France?

When I refer to the public, I do not mean the happy few from professional circles who have access to film archives, to cinemathèques and to festivals, but the ordinary cinema-goer, the *cinéphile de province*.

For *De Røde Enge*, I can give at least a partial answer to my question: data provided by the Danish Film Institute shows that 3 862 people have seen the film in a cinema since 1976. And that's about it. As for *Juventude Em Marcha*, the film was released in Portugal in November 2006 and attracted just under 2 000 spectators; its French release is announced for May 2007, a full year after the screening in Cannes. Again, that's about it.

After *les marches*...

Of course, I have chosen two very extreme examples here: measuring the effective public access to the films screened in Cannes during the first 59 festivals would require a considerably more detailed study.

Later access opportunities are, it goes without saying, related to initial success. The table opposite shows the wide disparities in the subsequent fortunes of the films which have received the *Palme d'Or*. Cumulative cinema admissions in Europe vary between the 250 000 admissions or so registered by Imamura's *Unagi* and the 9.4 million tickets sold for Michael Moore's *Fahrenheit 9/11*.

Differences are evident not only in the level of success, but can also be perceived in the life cycles of these films in cinemas: *Fahrenheit 9/11* registered 99.9% of its European admissions during the first calendar year of release, whilst Angelopoulos'

Mia eoniotita ke mia mera (*Eternity and a Day*) clocked up only 40.8% of its European admissions in the first year of release, followed by 45.9% in the second year and a further 9.2% in the third year. This is a slower than average career but also a relatively short life. Taken as a whole, the *Palme d'Or* of the period 1996-2005 registered 79.2% of their total admissions during the first year of release, 19.9% during the second year and 0.8% during the third year. From the third year onwards the number of tickets sold is minimal. This rapid obsolescence of films on screens is an economic characteristic familiar to distributors and exhibitors and is a far from recent phenomenon. The general consensus is, however, that the rate of obsolescence is accelerating due to the pressure of the increasing number of films on offer. Inflation in the number of prints for leading films compounds the difficulties faced by smaller films when it comes to staying on screens. In this context, preserving diversity is of growing concern.

...the "Long Tail"

The basic problem with theatrical distribution is that it does not allow a film to take advantage of what is now qualified in the digital world as the "Long Tail" effect. For those of you not yet familiar with Long Tail theory (translated in French as *longue traîne*), let me remind you that the phrase was coined in October 2004 by Chris Anderson, editor of *Wired* magazine. Anderson argued that products that are in low demand or have low sales volume can collectively make up a market share that rivals or exceeds the relatively few current bestsellers and

Admissions in Europe and North America for films which have won the *Palme d'Or* | since 1996

Year of <i>Palme</i>	Original title	Director	Admissions est		
			in Europe	in US and Canada	in the country of origin
1996	Secrets and Lies	Mike Leigh	4 693 618	2 950 611	549 574
1997	Unagi	Shohei Imamura	242 820	~	~
	Ta'm e guilass	Abbas Kiarostami	421 779	~	~
1998	Mia eoniotita ke mia mera	Theo Angelopoulos	443 443	1 719	~
1999	Rosetta	J.P. and L. Dardenne	1 253 462	38 739	184 157
2000	Dancer in the Dark	Lars von Trier	3 791 324	755 907	202 782
2001	La stanza del figlio	Nanni Moretti	2 748 024	~	1 154 241
2002	The Pianist	Roman Polanski	8 739 120	5 231 024	1 767 715
2003	Elephant	Gus Van Sant	1 211 518	208 520	208 520
2004	Fahrenheit 9/11	Michael Moore	9 399 079	19 181 158	19 181 159
2005	L'enfant	J.P. and L. Dardenne	729 976	~	151 505
2006	The Wind That Shakes the Barley	Ken Loach	2 410 382 ⁽¹⁾	~	802 210

(1) Provisional figure.

Source: OBS (Lumière database: <http://lumiere.obs.coe.int>)

blockbusters, if the distribution channels are wide enough. By offering broad access to vast catalogues, the Internet retail business is considered as the model of the Long Tail theory.

Purist proponents of the belief that “films should be seen in cinemas” find it hard to admit that digital technologies and the new forms of distribution associated with them, such on-line retailing and video-on-demand, represent a historic opportunity to benefit from the Long Tail effect. A study recently published by the UK Film Council⁽¹⁾, gives clear factual evidence for the existence of this opportunity. It attempts to quantify the extent to which the demand for independent UK and specialised films (a concept used in UK to qualify what would be called *films d'art et d'essai* elsewhere) has been left unfulfilled by the limitations on traditional forms of distribution. These limitations are not only physical (shelf space in video shops and screens in the theatres) but also commercial. The study shows that there were 521 UK and specialised films released theatrically in the UK during 2003 and 2004. Of these films 352 (68%) were available through mainstream retail outlets but just 108 (21%) had had a traditional video rental release. However, 407 films (78%)

could be rented on-line, thus demonstrating the larger capacity (and the longer exposure) available through this kind of distribution. It can be supposed that this situation prefigures a similar one in video-on-demand when this form of distribution reaches maturity. The larger exposure provided by on-line rental also has a direct impact of the level of concentration of the market. The top 25 films released in 2004 registered 65.9% of cinema box office revenues, but only 17.8% of DVD rental revenues in video shops, 15.9% of retail revenues and a mere 1.9% of on-line rental revenues. Of course, it can be argued that the on-line rental business is tiny and reaches only a limited public. Nevertheless, the study shows that the average ratio between on-line rental and retail for UK and specialised films is 38%, demonstrating clearly that on-line rental constitutes a real second chance.

Another recent study on the development of video-on-demand in Europe illustrates the rapid emergence of this new kind of distribution. At the end of 2006 almost 150 operational services have been identified in 24 European countries. Of course most of these offer chiefly the usual US blockbusters and popular domestic titles. However

(1) Screen Digest and Lanterna Magica, *Feasibility Study of a Digital Platform for the Delivery of UK Independent and Specialised Films to the Home*, UK Film Council, June 2006, <http://www.ukfilmcouncil.org.uk/get/?doc=164>

a number of services have been created with a focus on independent, art house and experimental films: in France by an association of independent producers, in Spain by two copyright collecting agencies, in Norway by the national film institute. The UK Film Council study mentioned here makes interesting recommendations that would no doubt be of interest to most of the public and private organisations involved in the promotion of film diversity. The MEDIA Programme of the European Union and Eurimages, the co-production, distribution and exhibition fund of the Council of Europe, are currently studying possible initiatives to encourage the wider circulation of European films through video-on-demand services.

Of course it is not yet clear when you will have the chance to catch *De Røde Enge* or *Juventude Em Marcha* through a VoD service, if you missed them in Cannes or if your favourite local cinema never programmed them (both highly plausible hypotheses). Nonetheless a concrete prospect now exists that these films will eventually become accessible in the on-line universe. It is a prospect that should render obsolete the doubtful concept of “festival films”. Though not, of course, the festivals, nor the importance of theatrical exhibition in the value chain.

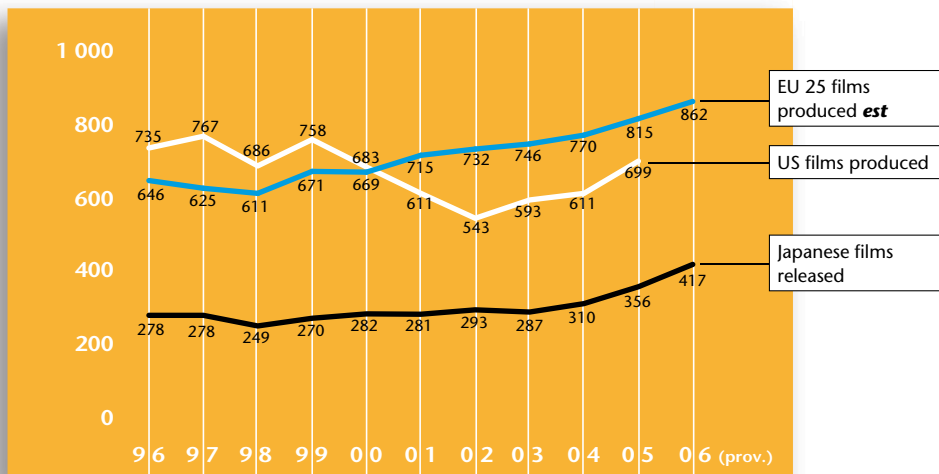
And while we are waiting, *Mesdames, préparez vos longues traînes et Messieurs, vos queues de pie!* Ladies, prepare your long dresses, and gentlemen, your tails!

André Lange

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

Number of feature films produced in the European Union, the United States and Japan | 1996-2006

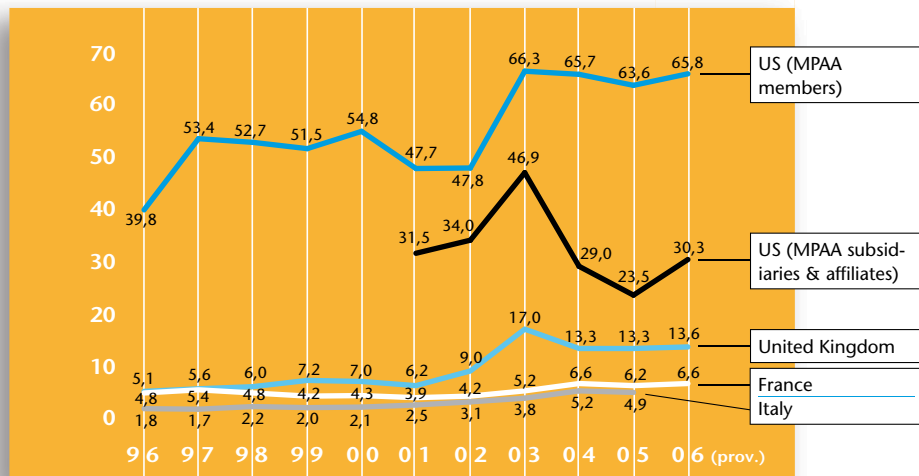
Source: OBS



Average cost of production of feature films | 1996-2006

USD million.

Source: OBS

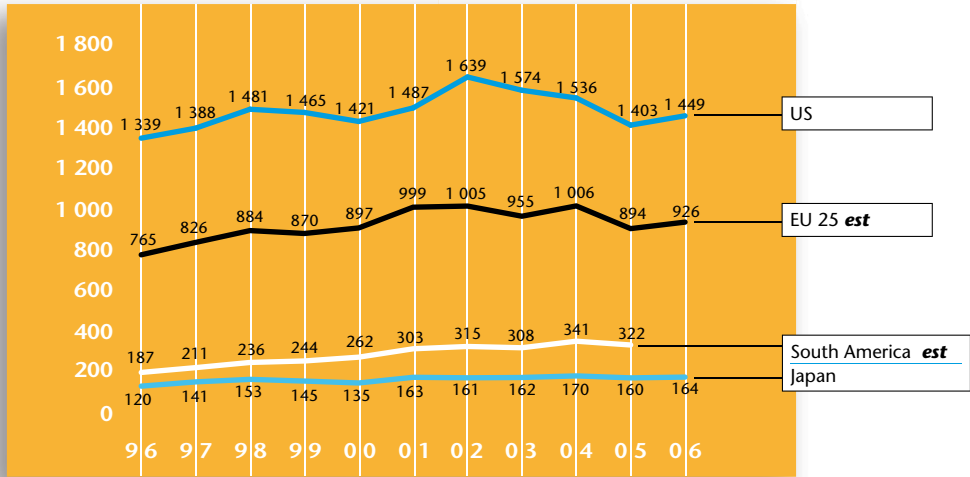


Note: data for Italy has been revised.

Admissions | 1996-2006

In millions.

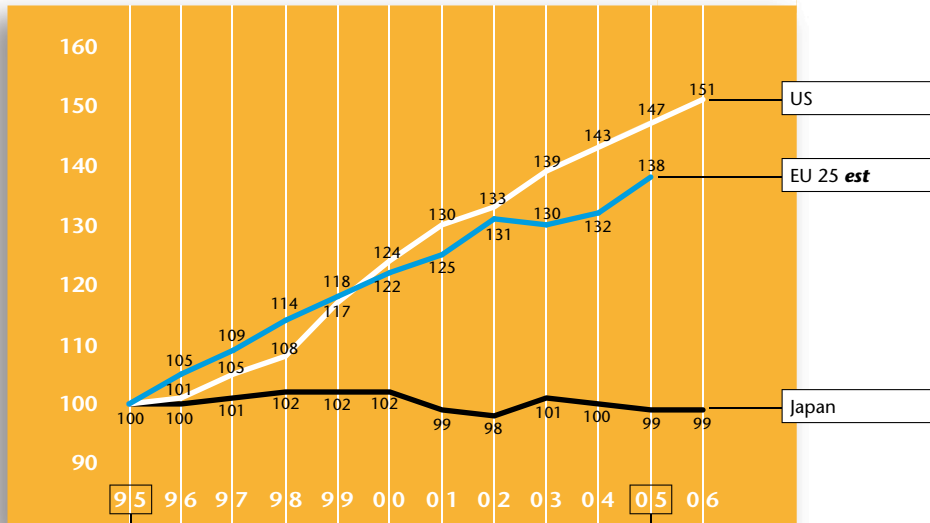
Sources: MPA/OBS/Informa Media/Eiren



Evolution of average ticket prices | 1995-2006

Base 100 in 1995, calculated in national currency.

Source: OBS

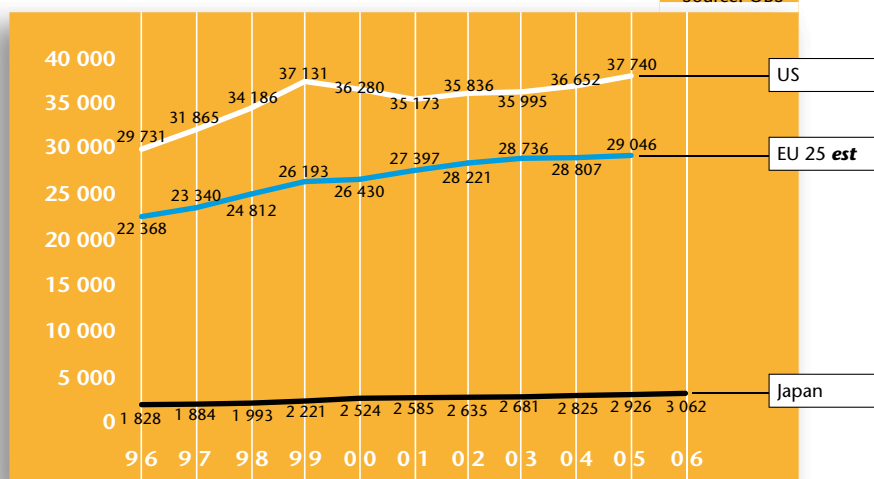


EU 25:	5,63 USD
US:	4,35 USD
JP:	13,21 USD

EU 25:	7,39 USD
US:	6,41 USD
JP:	11,24 USD

Number of screens | 1996-2006

Source: OBS



World box office top 20 | 2006

USD million.

	Original title	Country of origin	North American box office	International box office	Total
1	Pirates of the Caribbean: Dead Man's Chest	US	423	642	1 065
2	The Da Vinci Code	US/GB inc	218	540	758
3	Ice Age: The Meltdown	US	195	452	647
4	Casino Royale ⁽¹⁾	GB inc/US/DE/CZ	155	339	494
5	Cars	US	244	218	462
6	X-Men: The Last Stand	US	234	225	459
7	Mission: Impossible III	US/DE	134	264	398
8	Superman Returns	US/AU inc	200	190	390
9	Over the Hedge	US	155	179	334
10	The Chronicles of Narnia I ⁽²⁾	US/NZ inc	66	256	322
11	The Devil Wears Prada	US	125	195	320
12	Happy Feet ⁽¹⁾	AU/US	178	114	292
13	Borat ⁽¹⁾	US	126	114	240
14	The Departed ⁽¹⁾	US	120	116	236
15	Click	US	137	95	232
16	The Break-Up	US	119	85	204
17	Night at the Museum	US	127	60	187
18	Inside Man	US	89	96	185
19	Poseidon	US	61	121	182
20	Open Season ⁽¹⁾	US	84	96	180

(1) Still on release in 2007.

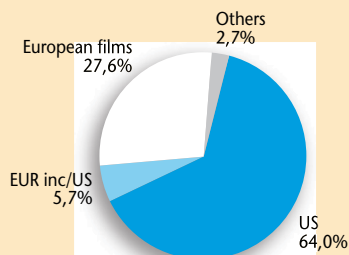
(2) 2005 release, box office 2006 only.

Source: Variety

European Union

Population 2006	463,5 million
GDP 2006	14 310 billion USD
1 USD	0,74 EUR (April 2007)
Admissions 2006 est	926 million
Average admissions/capita 2006 est	2,00
Average ticket price 2005	5,94 EUR (= 7,39 USD)
Screens 2005 est	29 046
Screens in multiplexes (31/10/2006)	10 942

Market shares 2006 est



Film production levels reach a new high

On the basis of available data, the European Audiovisual Observatory estimates that a total of 862 films were produced in the 25 Member States of the European Union in 2006, an increase of 47 films in relation to 2005 (815 films). Countries contributing to overall growth were Germany (+20 fiction features), Italy (+20 films) and Spain (+15 films). Among the smaller markets, Austria and Hungary both reported an additional 10 films produced in 2006. Countries registering reduced production levels included Denmark and France, where 2006 signalled a return to more typical levels of activity after an exceptional 2005.

Positive growth in cinema admissions

Admissions in the European Union registered renewed growth following a 11% drop between 2004 and 2005. An estimated 926 million tickets were sold during 2006, a 3.6% increase on the total for the preceding year.

Among the major markets Germany (+7.4%) and France (+7.6%) showed clear recovery from the lacklustre results registered in 2005. With 188.7 million tickets sold in 2006, France registered the second best score since 1984. Performances were, however, mixed in the three other large markets. Cinema admissions rose by just 1.6% in Italy, whilst in Spain (-4.7%) and the United Kingdom (-4.9%) the trend was negative.

Elsewhere in Europe 2006 closed on a more optimistic note. This was especially true in the three Baltic markets: admissions almost doubled in Lithuania while Estonia (+40.2%) and Latvia (+22.7%) also

showed impressive increases. Double-digit growth was registered in the Czech Republic (+21.4%), Finland (+10.6%) and Slovenia (+10.8%), whilst preliminary results in the Slovak Republic (+54.3%) are the best since 1998. With 32 million tickets sold, Poland also reported a strong upturn in 2006, almost entirely recovering the admissions lost in 2005.

Market share for European films on the increase

Provisional estimates for market shares in the European Union in 2006 show European films achieving a market share of 27.6%, up from the 24.9% recorded in 2005. The most successful European titles were French comedy *Les Bronzés 3: amis pour la vie*, which owes its success mainly to the 10.4 million tickets sold on the French market, and German literary adaptation *Perfume: The Story of a Murderer*, which registered 5.5 million admissions in Germany and a further 4.2 million in other European countries.

Films produced in Europe and benefiting from incoming US investment were far less prominent during the year and obtained a market share of 5.7%, significantly less than the 12.8% registered in 2005. Finally US films (including US films considered as inward investment films in Europe) had earned a market share of 59.7% in 2005: in 2006 the share obtained was slightly higher at 64% of total European Union admissions.

Source: OBS

Number of feature films produced in the European Union | 2001-2006

In units.

Country		prov.						Sources
		2001	2002	2003	2004	2005	2006	
Austria	Total	12	26	20	24	24	34	FAF
	maj. co-prod.	~	~	~	~	~	11	FAF
	min. co-prod.	~	~	~	~	~	1	FAF
Belgium	100% national	4	6	5	8	9	8	MFB/OBS
	maj. co-prod.	6	9	9	12	11	13	MFB/OBS
	min. co-prod.	13	12	18	26	16	25	MFB/OBS
Bulgaria ⁽¹⁾	100% national	3	5	2	3	2	4	NFC
	maj. co-prod.	3	1	1	2	1	3	NFC
	min. co-prod.	2	~	1	3	3	3	NFC
Cyprus	100% national	0	0	0	0	~	~	PIO/Min.Ed & Cult.
	maj. co-prod.	4	2	1	~	1	~	PIO/Min.Ed & Cult.
	min. co-prod.	0	0	1	1	1	~	PIO/Min.Ed & Cult.
Czech Rep.	100% national	12	18	10	19	17	24	Min.Cult./OBS
	maj. co-prod.	5	1	4	1	4	2	Min.Cult./OBS
	min. co-prod.	1	0	3	1	3	~	Min.Cult./OBS
Denmark	100% national fiction	7	11	12	12	16	13	DFI
	maj. co-prod. (fiction)	12	8	12	7	15	9	DFI
	min. co-prod. (fiction)	3	4	5	8	~	~	DFI
	Feature documentaries	5	9	9	6	10	7	DFI
Estonia	100% national	2	1	1	2	5	4	EFSA
	maj. co-prod.	1	1	1	1	1	3	EFSA
Finland	Total (fiction)	12	10	11	13	11	14	FFF
	Feature documentaries	4	2	3	5	4	2	FFF
France	Total	204	200	212	203	240	203	CNC
	100% national	126	106	105	130	126	128	CNC
	maj. co-prod.	46	57	78	37	61	36	CNC
	min. co-prod.	32	37	29	36	53	39	CNC
Germany	Total	107	117	107	121	146	174	SPIO
	100% national fiction	57	39	54	60	60	78	SPIO
	Co-prod. (fiction)	26	45	26	27	43	44	SPIO
	maj. co-prod.	~	~	~	~	18	20	SPIO
	min. co-prod.	~	~	~	~	25	24	SPIO
	Feature documentaries	24	33	27	34	43	52	SPIO
Greece ⁽²⁾	100% national	15	15	20	15	21	19	GFC/OBS
	maj. co-prod.	3	3	3	3	2	2	GFC/OBS
Hungary	100% national	20	19	19	19	17	25	Min.Cult./AHFD/NFO
	maj. co-prod.	2	5	1	4	1	3	Min.Cult./AHFD/NFO
Ireland	Total	9	3	10	13	12	12	IFB/OBS
Italy	Total	103	130	117	138	98	117	OIA
	100% national	71	97	97	97	70	92	OIA
	maj. co-prod.	21	16	13	18	13	11	OIA
	min. co-prod.	11	17	7	23	15	14	OIA
Latvia	100% national	2	0	7	2	0	0	NFCLV
	maj. co-prod.	0	1	0	1	2	3	NFCLV

Continued overleaf

Continued

Number of feature films produced in the European Union | 2001-2006

In units.

Country		2001	2002	2003	2004	2005	prov. 2006	Sources
Lithuania	100% national	0	0	1	1	0	1	Min. Cult./LK
	maj. co-prod.	0	0	0	0	1	1	Min. Cult./LK
	min. co-prod.	0	1	1	0	1	1	Min. Cult./LK
Luxembourg	100% national	0	1	0	2	1	2	CNA/LFF/OBS
	maj. co-prod.	~	~	1	1	2	1	CNA/LFF/OBS
	min. co-prod.	~	9	11	10	7	8	CNA/LFF/OBS
Malta	Total	0	0	1	1	1	0	MFC/OBS
The Netherlands	100% national	23	18	21	21	23	15	NFF
	maj. co-prod.	1	4	3	6	5	9	NFF
	min. co-prod.	4	7	9	1	3	5	NFF
Poland	100% national	27	27	18	17	19	25	Min. Cult./PISF/OBS
	maj. co-prod.	1	0	1	0	2	1	Min. Cult./PISF/OBS
	min. co-prod.	1	3	1	3	2	~	Min. Cult./PISF/OBS
Portugal	100% national	4	2	6	7	9	3	ICAM
	maj. co-prod.	10	8	10	5	3	11	ICAM
	min. co-prod.	3	3	1	4	5	7	ICAM
	Feature documentaries	4	6	4	9	8	13	ICAM
Romania ⁽¹⁾	100% national	6	8	7	9	8	14	CNC
	maj. co-prod.	2	1	1	2	2	2	CNC
	min. co-prod.	6	0	9	10	9	4	CNC
Slovakia	100% national	2	0	1	2	2	0	SKFI/AIC
	Co-productions	2	6	7	1	3	2	SKFI /AIC
	maj. co-prod.	~	~	3	0	1	1	SKFI /AIC
	min. co-prod.	~	~	4	1	2	1	SKFI /AIC
Slovenia	100% national	8	9	2	4	7	4	SFF/OBS
	Co-productions	1	1	5	1	3	3	SFF/OBS
	maj. co-prod.	~	~	4	0	1	2	SFF/OBS
	min. co-prod.	~	~	1	1	2	1	SFF/OBS
Spain	Total	107	137	110	133	142	150	ICAA
	100% national	67	80	68	92	89	109	ICAA
	maj. co-prod.	19	22	16	17	29	24	ICAA
	min. co-prod.	21	35	26	24	24	17	ICAA
Sweden	100% national	16	12	14	22	30	32	SFI
	maj. co-prod.	9	9	13	14	15	12	SFI
	min. co-prod.	4	7	9	6	8	4	SFI/OBS
United Kingdom	Total	83	84	88	75	78	78	SF
100% national	100% national	52	41	40	28	42	37	SF
	maj. co-prod.	12	19	18	19	20	21	SF
	min. co-prod.	15	18	21	17	12	12	SF
	Incoming US production (*)	3	6	5	10	4	8	SF
	Other incoming production	1	0	4	1	0	0	SF
	100% national	51	37	44	27	39	50	UKFC Int.
	Co-productions	~	66	99	84	67	57	UKFC Int.
EU 25 ⁽³⁾ est.		715	732	746	770	815	862	OBS

(1) European Union member state from January 2007. Not included in EU totals 2001 to 2006.

Data in italics are estimated.

(2) Revised series.

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

Admissions in the European Union | 2001-2006

In millions.

Country							<i>prov.</i>	2006/05
	2001	2002	2003	2004	2005	2006		
Austria	18,83	19,32	17,71	19,38	15,72	17,27	9,9%	
Belgium	24,03	24,38	22,71	24,12	22,10	23,80	7,7%	
Bulgaria ⁽¹⁾	2,01	2,02	3,04	3,12	2,42	2,37	-2,3%	
Cyprus	0,86	0,96	1,00	0,96	0,78	~	-	
Czech Republic	10,36	10,69	12,14	12,05	9,48	11,51	21,4%	
Denmark	11,97	12,91	12,30	12,79	12,19	12,60	3,4%	
Estonia	1,30	1,56	1,27	1,19	1,13	1,59	40,2%	
Finland	6,50	7,70	7,70	6,90	6,06	6,70	10,6%	
France	187,45	184,41	173,46	195,38	175,39	188,67	7,6%	
Germany	177,93	163,91	148,96	156,71	127,32	136,68	7,4%	
Greece <i>est.</i>	~	~	~	12,00	12,70	~	-	
Hungary	15,70	15,28	13,65	13,66	12,12	11,67	-3,8%	
Ireland	15,94	17,32	17,43	17,26	16,40	17,85	8,9%	
Italy	113,26	115,59	110,45	116,34	105,55	107,29	1,6%	
Latvia	1,15	1,07	1,13	1,68	1,68	2,06	22,7%	
Lithuania	2,37	1,39	1,44	1,40	1,22	2,41	98,3%	
Luxembourg	1,41	1,43	1,26	1,36	1,16	1,24	7,2%	
Malta <i>est.</i>	1,04	1,06	1,08	1,03	0,99	~	-	
Netherlands	23,95	24,12	24,96	23,05	20,65	22,52	9,0%	
Poland	26,20	25,90	23,77	33,40	23,57	32,00	35,8%	
Portugal ⁽²⁾	19,47	19,48	18,72	17,14	15,75	16,37	3,9%	
Romania ⁽¹⁾	5,73	5,32	4,53	4,00	2,83	2,70	-4,6%	
Slovakia	2,85	3,17	2,97	2,90	2,20	3,40	54,3%	
Slovenia	2,47	2,78	2,97	3,00	2,44	2,71	10,8%	
Spain	146,81	140,71	137,47	143,93	127,65	121,65	-4,7%	
Sweden	18,10	18,30	18,17	16,61	14,61	15,29	4,7%	
United Kingdom	155,91	175,90	167,26	171,25	164,69	156,56	-4,9%	
EU 25 <i>est.</i>	999	1 005	955	1 006	894	926	3,6%	

Data in italics are estimated or provisional.

(1) European Union member state from January 2007 onwards. Not included in EU totals 2001 to 2006.

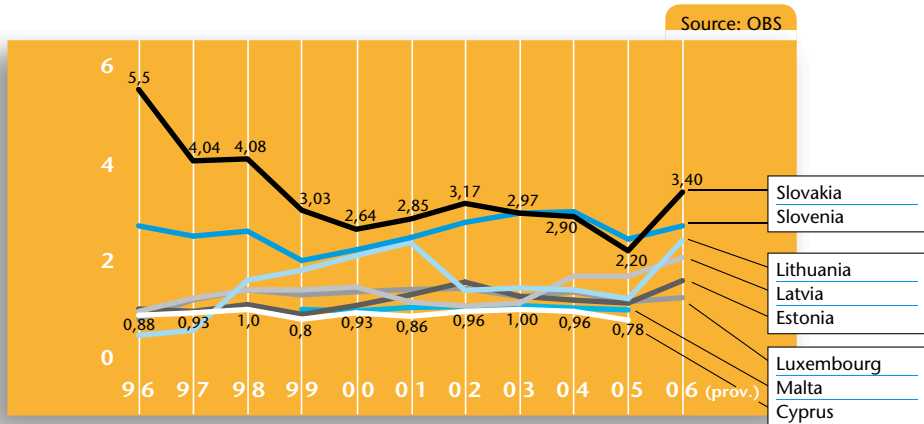
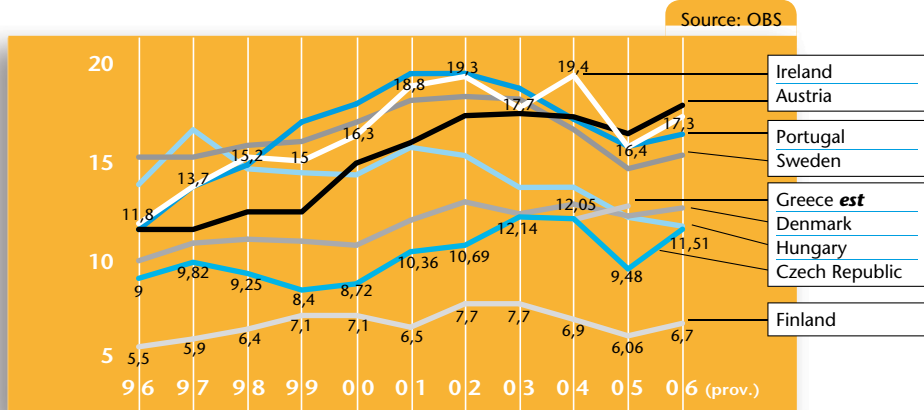
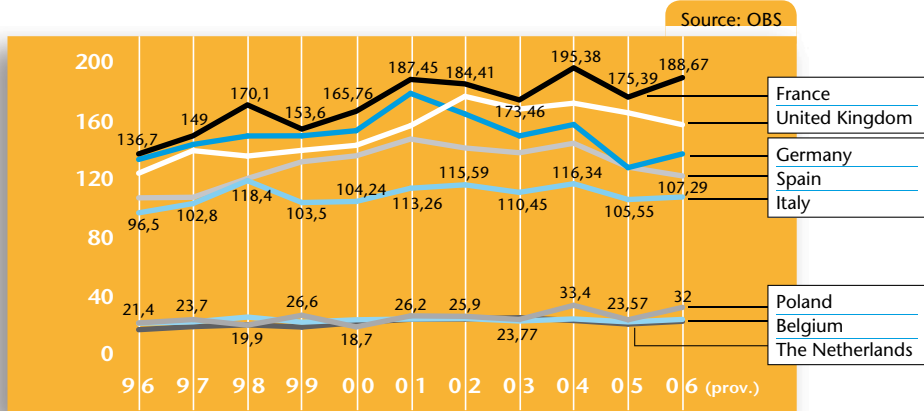
(2) Data from 2004 onwards are not comparable with previous years.

Source: OBS

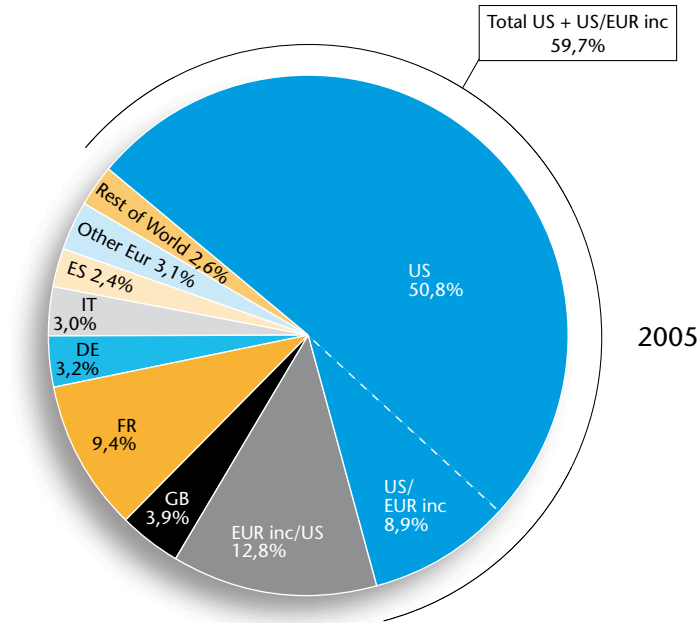
European Union

Admissions in the European Union | 1996-2006

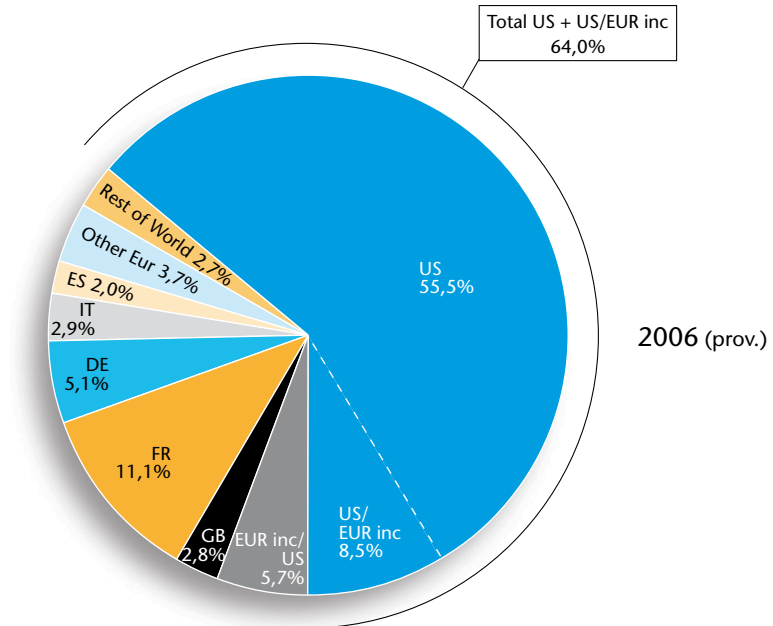
In millions.



Breakdown of European Union admissions by the origin of films | 2005-2006



2005



2006 (prov.)

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

Source: OBS/LUMIERE

European Union

The tables below are based on an analysis of around 80% of admissions in 34 European countries for 1996-2005 and of admissions in 21 European countries, including Turkey, for 2006.

Top 25 films by admissions in Europe | since 1996

	Original title	Country of origin	Year	Director	Admissions
1	Titanic	US	1997	James Cameron	103 701 045
2	The Lord of the Rings I	US/NZ inc	2001	Peter Jackson	60 956 862
3	Harry Potter and the Philosopher's Stone	GB inc/US	2001	Chris Columbus	60 436 415
4	The Lord of the Rings II	US/NZ inc	2002	Peter Jackson	55 577 510
5	The Lord of the Rings III	US/NZ inc/DE	2003	Peter Jackson	54 676 060
6	Harry Potter and the Chamber of Secrets	GB inc/US	2002	Chris Columbus	52 559 583
7	Finding Nemo	US	2003	A. Stanton & L. Unkrich	44 855 862
8	Star Wars I - The Phantom Menace	US	1999	George Lucas	44 845 705
9	Pirates of the Caribbean: Dead Man's...	US	2006	Gore Verbinski	44 611 728
10	Shrek 2	US	2004	A. Adamson & K. Asbury	44 602 590
11	Harry Potter and the Goblet of Fire	GB inc/US	2005	Mike Newell	43 566 802
12	Independence Day	US	1996	Roland Emmerich	42 597 509
13	Harry Potter and the Prisoner of Azkaban	GB inc/US	2004	Alfonso Cuarón	40 554 734
14	Ice Age: The Meltdown	US	2006	Carlos Saldanha	40 274 018
15	The Sixth Sense	US	1999	M. Night Shyamalan	37 119 466
16	The Da Vinci Code	US/GB inc	2006	Ron Howard	35 825 233
17	Men in Black	US	1997	Barry Sonnenfeld	33 601 789
18	Spider-Man	US	2002	Sam Raimi	33 540 305
19	The Matrix Reloaded	US	2003	A. & L. Wachowski	33 355 634
20	The Chronicles of Narnia I	US/NZ inc	2005	Andrew Adamson	33 252 652
21	Star Wars III - Revenge of the Sith	US/GB inc	2005	George Lucas	33 032 446
22	Gladiator	US	2000	Ridley Scott	32 327 067
23	Tarzan	US	1999	C. Buck & K. Lima	31 715 555
24	Star Wars II - Attack of the Clones	US	2002	George Lucas	31 231 527
25	Pirates of the Caribbean: Curse of Black...	US	2003	Gore Verbinski	30 420 805

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	30 267 261
2	Notting Hill	GB/US	1999	Roger Michell	29 692 400
3	Bean	GB/US	1997	Mel Smith	25 809 024
4	The Full Monty	GB	1997	Peter Cattaneo	25 454 041
5	Astérix & Obélix : Mission Cléopâtre	FR/DE	2002	Alain Chabat	22 365 593
6	Astérix et Obélix contre César	FR/DE/IT	1999	Claude Zidi	21 734 506
7	Le cinquième élément	FR	1997	Luc Besson	21 680 774
8	Le fabuleux destin d'Amélie Poulain	FR/DE	2001	Jean-Pierre Jeunet	21 154 647
9	Bridget Jones: The Edge of Reason	GB/US/FR/DE/IE	2004	Beeban Kidron	20 414 910
10	La vita è bella	IT	1997	Roberto Benigni	20 346 314
11	Love Actually	GB/US	2003	Richard Curtis	16 255 282
12	The Others	ES/US	2001	Alejandro Amenábar	14 670 027
13	Johnny English	GB/US	2003	Peter Howitt	14 525 325
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	12 901 854
17	Les choristes	FR/CH	2004	Christophe Barratier	11 931 627
18	Les Bronzés 3: amis pour la vie	FR	2006	Patrice Leconte	11 182 902
19	About a Boy	GB/US/FR/DE	2002	Paul Weitz, Chris Weitz	10 959 832
20	Le dîner de cons	FR	1998	Francis Veber	10 921 930
21	Good Bye, Lenin!	DE	2003	Wolfgang Becker	10 836 533
22	(T)Raumschiff Surprise - Periode 1	DE	2004	Michael Herbig	10 763 145
23	Der Untergang	DE/IT	2004	Oliver Hirschbiegel	9 805 310
24	Perfume: The Story of a Murderer	DE/ES/FR	2006	Tom Tykwer	9 716 052
25	Trainspotting	GB	1996	Danny Boyle	9 507 542

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 21 European countries (including Turkey) – around 81% of total admissions in the European Union (EU 25) are analysed.

Top 25 films by admissions in Europe | 2006

Original title	Country of origin	Year	Director	Admissions
1 Pirates of the Caribbean: Dead...	US	2006	Gore Verbinski	44 611 728
2 Ice Age: The Meltdown	US	2006	Carlos Saldanha	40 274 018
3 The Da Vinci Code	US/GB inc	2006	Ron Howard	35 825 233
4 Casino Royale	GB inc/US/DE/CZ	2006	Martin Campbell	25 978 596
5 Cars	US	2006	John Lasseter	16 557 857
6 The Devil Wears Prada ⁽¹⁾	US	2006	David Frankel	14 621 164
7 Over the Hedge	US	2006	Johnson & Kirkpatrick	14 197 800
8 The Chronicles of Narnia I ⁽²⁾	US/NZ inc	2005	Andrew Adamson	13 601 655
9 X-Men: The Last Stand	US	2006	Brett Ratner	12 981 703
10 Les Bronzés 3: amis pour la vie	FR	2006	Patrice Leconte	11 182 902
11 Mission: Impossible III	US/DE	2006	J.J. Abrams	10 845 098
12 Perfume: The Story of a Murderer ⁽¹⁾	DE/ES/FR	2006	Tom Tykwer	9 716 052
13 Borat	US	2006	Larry Charles	9 558 319
14 Superman Returns	US/AU inc	2006	Bryan Singer	9 100 165
15 Garfield: A Tail of Two Kitties	US/GB inc	2006	Tim Hill	9 094 060
16 The Departed	US	2006	Martin Scorsese	9 043 958
17 Brokeback Mountain	US	2005	Ang Lee	8 385 624
18 Happy Feet ⁽¹⁾	AU/US	2006	George Miller	8 164 303
19 Volver	ES	2006	Pedro Almodóvar	7 764 802
20 Inside Man	US	2006	Spike Lee	7 721 519
21 Memoirs of a Geisha ⁽³⁾	US	2005	Rob Marshall	7 630 964
22 Chicken Little ⁽⁴⁾	US	2005	Mark Dindal	7 278 791
23 Eragon ⁽¹⁾	US/GB	2006	Stefen Fangmeier	6 774 149
24 Flushed Away ⁽¹⁾	GB inc/US	2006	D. Bowers & S. Fell	6 754 816
25 Open Season	US	2006	R. Allers & J.Culton	6 456 149

(1) Still on release in 2007.

(2) 19 650 997 admissions in Europe in 2005.

(3) 303 705 admissions in Europe in 2005.

(4) 6 845 411 admission in Europe in 2005.

Source: OBS/LUMIERE

Top 25 European films by admissions in Europe | 2006

Original title	Country of origin	Year	Director	Admissions
1 Les Bronzés 3: amis pour la vie	FR	2006	Patrice Leconte	11 182 902
2 Perfume: The Story of a Murderer ⁽¹⁾	DE/ES/FR	2006	Tom Tykwer	9 716 052
3 Volver	ES	2006	Pedro Almodóvar	7 764 802
4 Camping	FR	2006	Fabien Onteniente	5 705 204
5 Kurtlar vadisi - Irak	TR	2006	S. Akar & S. Sentürk	4 683 241
6 7 Zwerge - Der Wald ist nicht genug	DE	2006	Sven Unterwaldt Jr.	4 134 263
7 Deutschland. Ein Sommermärchen	DE	2006	Sönke Wortmann	3 991 913
8 Prête-moi ta main ⁽¹⁾	FR	2006	Eric Lartigau	3 651 001
9 Je vous trouve très beau	FR	2005	Isabelle Mergault	3 640 455
10 The Queen ⁽¹⁾	GB/FR/IT	2006	Stephen Frears	3 479 423
11 Nanny McPhee ⁽²⁾	GB/US/FR	2005	Kirk Jones	3 477 904
12 La doublure	FR/IT	2006	Francis Veber	3 323 781
13 Indigènes ⁽¹⁾	FR/BE	2006	Rachid Bouchareb	3 228 220
14 United 93	GB/FR/US	2006	Paul Greengrass	3 188 290
15 Il mio miglior nemico	IT	2006	Carlo Verdone	3 172 727
16 Alatriste	ES	2006	Agustín Díaz Yanes	3 130 710
17 Arthur et les Minimoys ⁽¹⁾	FR	2006	Luc Besson	3 100 334
18 Natale a New York ⁽¹⁾	IT	2006	Neri Parenti	2 976 671
19 Ne le dis à personne	FR	2006	Guillaume Canet	2 792 540
20 Astérix et les Vikings	FR/DK	2006	S.Feldmark & J. Møller	2 706 885
21 Pride and Prejudice ⁽³⁾	GB/FR/US	2005	Joe Wright	2 603 915
22 OSS 117: Le Caire nid d'espions	FR	2006	Michel Hazanavicius	2 414 337
23 The Wind That Shakes the Barley	IE/GB/DE/ES/IT	2006	Ken Loach	2 410 382
24 Die Wilden Kerle 3	DE	2006	Joachim Masannek	2 193 490
25 Notte prima degli esami	IT	2006	Fausto Brizzi	2 145 283

(1) Still on release in 2007. (2) 3 517 382 admissions in Europe in 2005. (3) 4 749 656 admissions in Europe in 2005.

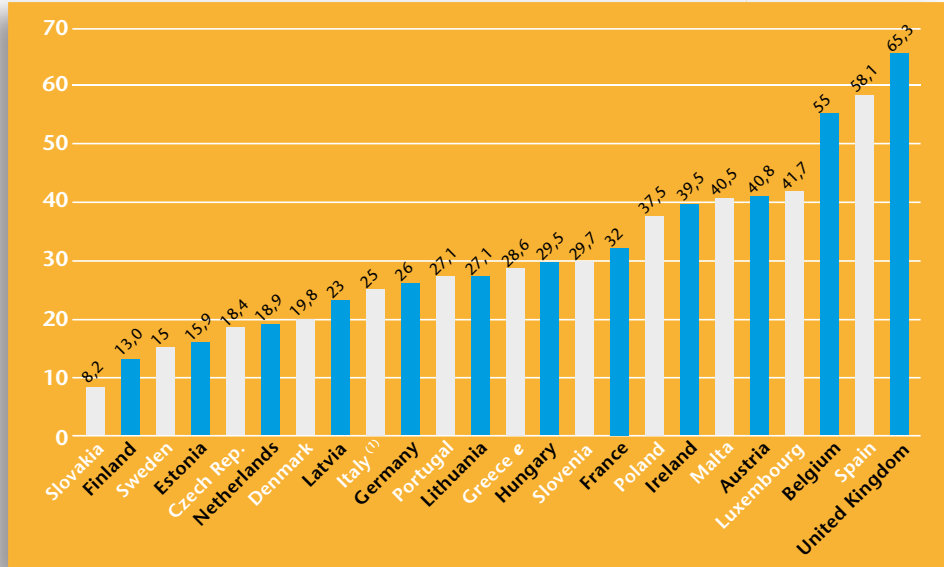
Note: does not include films produced in Europe with US inward investment.

Source: OBS/LUMIERE

Screens in multiplexes | 2005

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

Source: MEDIA Salles



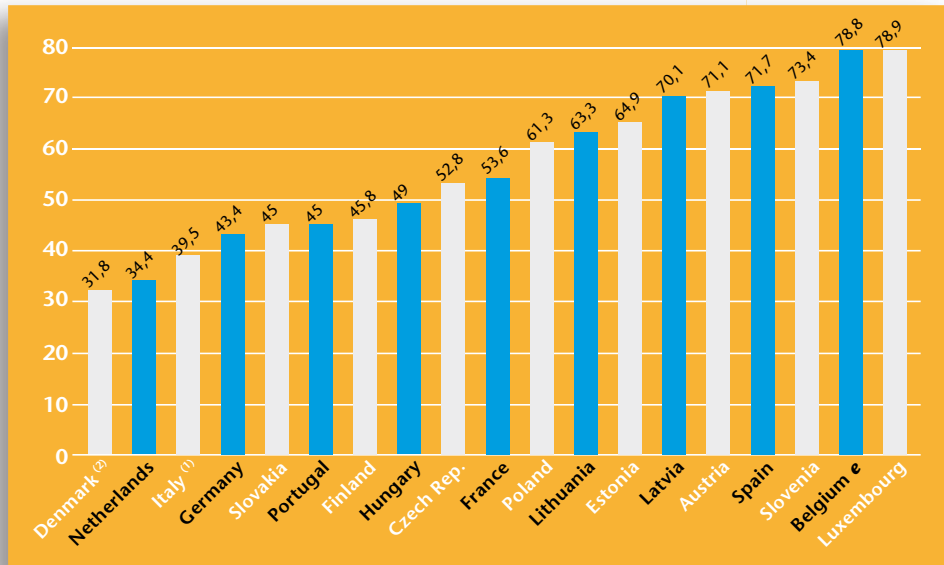
(1) Screens with more than 60 days of activity per year.

(2) 2004.

Admissions in multiplexes | 2005

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

Source: MEDIA Salles



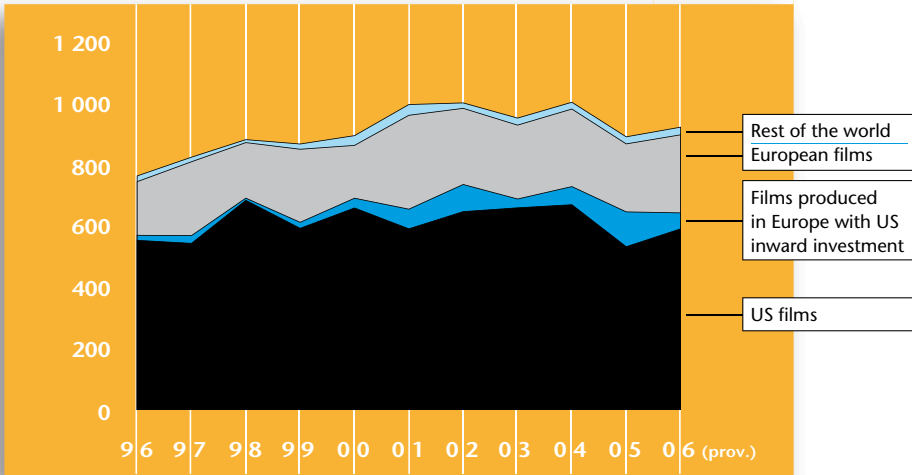
(1) Screens with more than 60 days of activity per year.

(2) 2003.

Admissions in the European Union | 1996-2006

In millions.

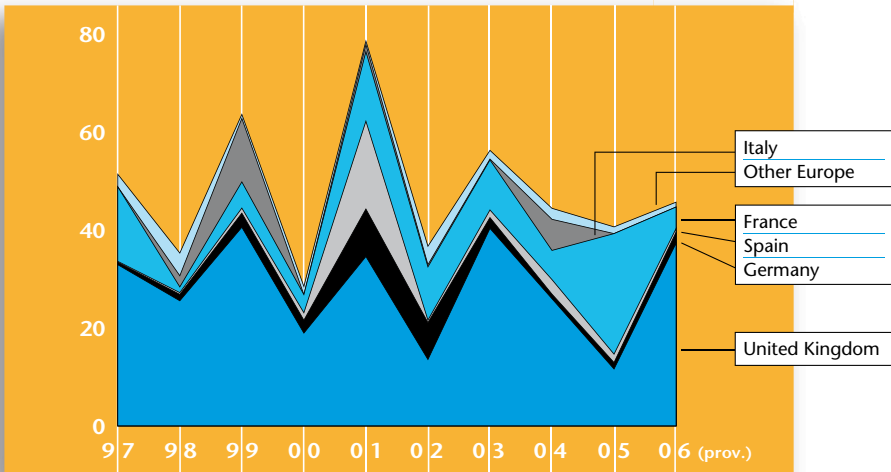
Source: OBS



Admissions to European films on the North American market | 1997-2006 est

In millions.

Sources: OBS

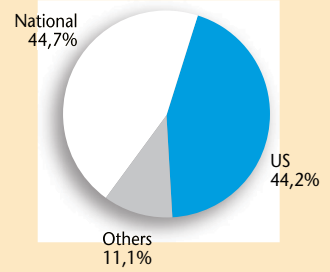


Note: Does not include films produced in Europe with US inward investment.

France

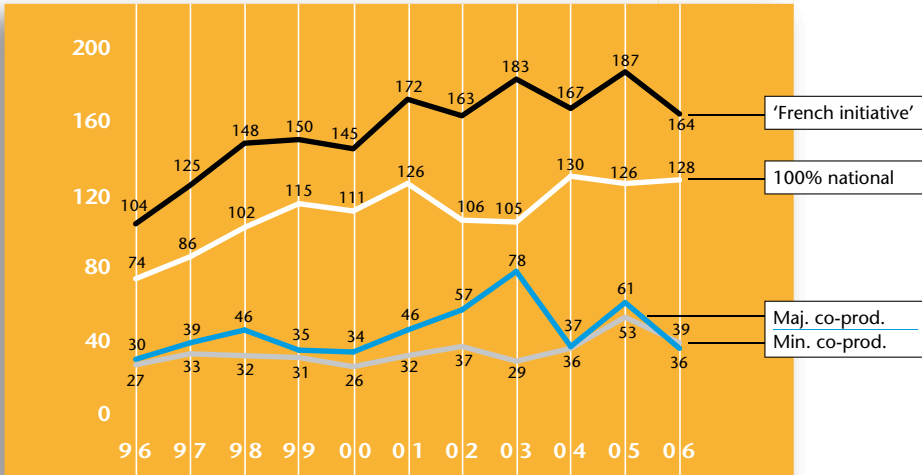
Population 2006	61,5 million
GDP 2005	2 127 billion USD
1 USD	0,75 EUR (March 2007)
Admissions 2006	188,67 million prov.
Average admissions/capita 2006	3,07
Average ticket price 2005	5,88 EUR (= 7,31 USD) prov.
Screens 2005	5 366
Screens in multiplexes 2005	32,0%
Admissions in multiplexes 2005	53,6%

Market shares 2006 est



Number of feature films produced | 1996-2006

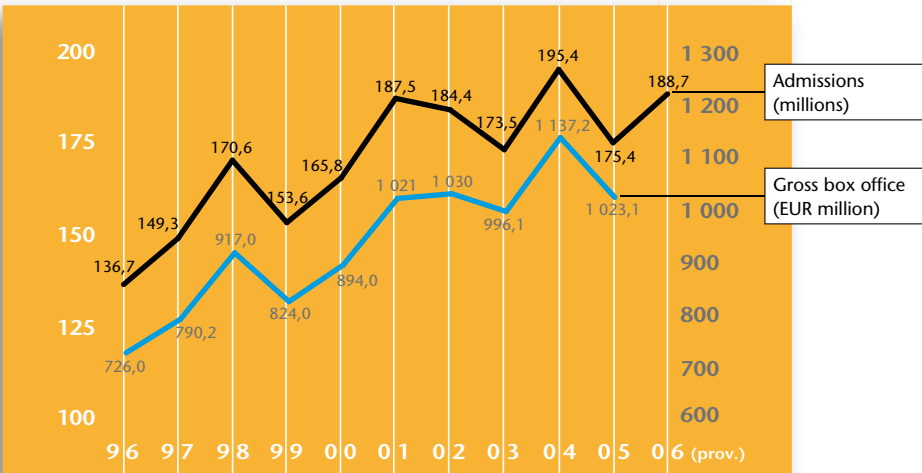
Source: CNC



Note: officially recognised films only.

Admissions and gross box office | 1996-2006

Source: CNC



Top 20 films by admissions in France | 2006

	Original title	Distributor	Country of origin	Director	Admissions
1	Les Bronzés 3: amis pour la vie	Warner	FR	Patrice Leconte	10 355 928
2	Pirates of the Caribbean: Dead...	BVI	US	Gore Verbinski	6 645 993
3	Ice Age: The Meltdown	Fox	US	Carlos Saldanha	6 637 122
4	Camping	Pathé	FR	Fabien Onteniente	5 486 244
5	The Da Vinci Code	Gaumont CTS	US/GB inc	Ron Howard	4 189 770
6	Je vous trouve très beau	Gaumont CTS	FR	Isabelle Mergault	3 536 621
7	Prête-moi ta main ⁽¹⁾	Mars	FR	Eric Lartigau	3 479 576
8	The Chronicles of Narnia I ⁽²⁾	BVI	US/NZ inc	Andrew Adamson	3 407 490
9	Indigènes ⁽¹⁾	Mars	FR/BE	Rachid Bouchareb	3 149 464
10	La Doublure	Gaumont CTS	FR/IT	Francis Veber	3 087 562
11	Casino Royale ⁽¹⁾	Gaum. CTS	GB inc/US/DE/CZ	Martin Campbell	2 929 192
12	X-Men: The Last Stand	Fox	US	Brett Ratner	2 824 427
13	Arthur et les Minimoys ⁽¹⁾	EuropaCorp	FR	Luc Besson	2 722 896
14	Ne le dis à personne ⁽¹⁾	EuropaCorp	FR	Guillaume Canet	2 703 405
15	OSS 117: Le Caire nid d'espions	Gaumont CTS	FR	Michel Hazanavicius	2 304 430
16	Volver	Pathé	ES	Pedro Almodóvar	2 291 912
17	The Devil Wears Prada ⁽¹⁾	Fox	US	David Frankel	2 167 494
18	Cars	BVI	US	John Lasseter	2 077 667
19	Fauteuils d'orchestre	Mars	FR	Danièle Thompson	1 968 438
20	Mission: Impossible III	UIP	US/DE	J.J. Abrams	1 923 831

(1) Still on release in 2007.

(2) 1 813 554 in 2005.

Source: Le film français

Production returns to 2004 levels

203 films received official recognition in France in 2006, a volume inferior to the exceptional figure recorded in 2005 (240 films), and identical to that of 2004. 164 films of these films were either entirely French productions or French majority co-productions (as opposed to 187 in 2005 and 167 in 2004). 75 films were produced as international co-productions, again a level closer to that of 2004 (73) than to the exceptional figure for 2005 (114). Overall investment in production amounted to EUR 1.15 billion, compared to 1.29 billion in 2005 and 1.05 in 2004 and the average budget for a French film was of EUR 5.27 million, up from EUR 4.99 million in 2005, but lower than the EUR 5.34 million registered in 2004.

Admissions

With 188.7 million admissions (+7.6%), 2006 was a good year in comparison to 2005 (175.4 million) but still below the attendance registered in 2004 (195.4 millions). The market was partly driven by the success of national films, particularly in the early part of the year. According to the most recent figures from the CNC, French films earned a market share of 44.7 % of admissions, against 44.2% for US films. This is the first time

since 1984 that French films have earned a higher market share than US titles. A total of 10 domestic productions found a place in the annual Top 20, led by *Les Bronzés 3*, a comedy sequel reuniting a group of friends first seen on film in 1978 and '79. In spite of these successes, there is growing concern in French professional circles about the mediocre performances of films in the "art et essai" category. For example, *Lady Chatterley*, directed by Pascale Ferran, winner of 6 César awards and highly praised by critics, will probably not sell a great deal more than 400 000 tickets. The problem is much discussed, to the extent that possible regulation of the number of prints authorised per film has even been mentioned in the context of the Presidential election campaigns.

Exports

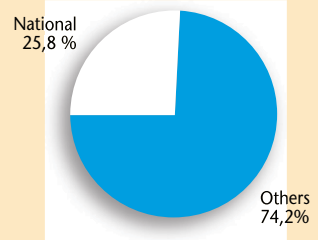
According to Unifrance, French films were less successful abroad in 2006 than in 2005: 55.8 million tickets were sold, a decrease of 23% in relation to 2005. But 2005 was an exceptional year, with more admissions to French films on foreign markets than in France, in part due to the enormous success of *La marche de l'empereur* on the US market. Seen in a longer term perspective, however, 2006 was in a fact a relatively satisfactory year for French films abroad.

Sources: CNC, Unifrance

Germany

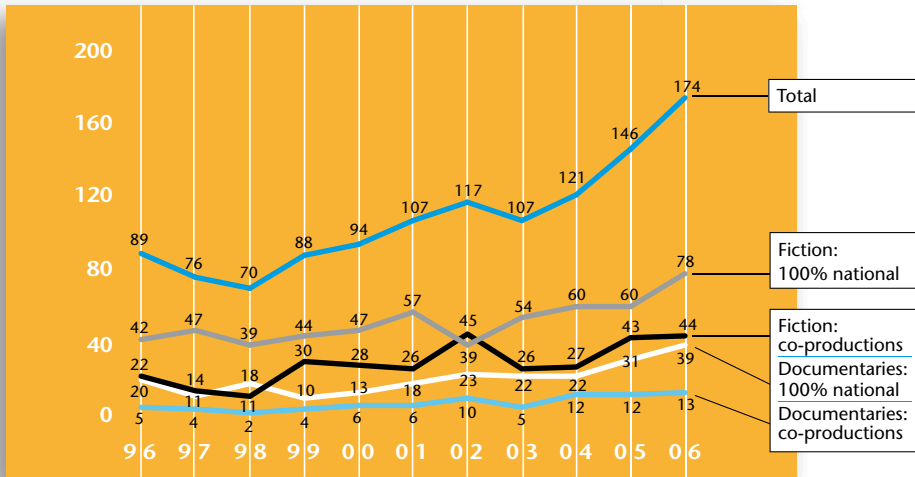
Population 2006	82,3 million
GDP 2005	2 787 billion USD
1 USD	0,75 EUR (March 2007)
Admissions 2006	136,7 million
Average admissions/capita 2006	1,66
Average ticket price 2006	5,96 EUR (= 7,49 USD)
Screens 2006	4 848
Screens in multiplexes 2005	26,0%
Admissions in multiplexes 2005	43,4%

Market shares 2006



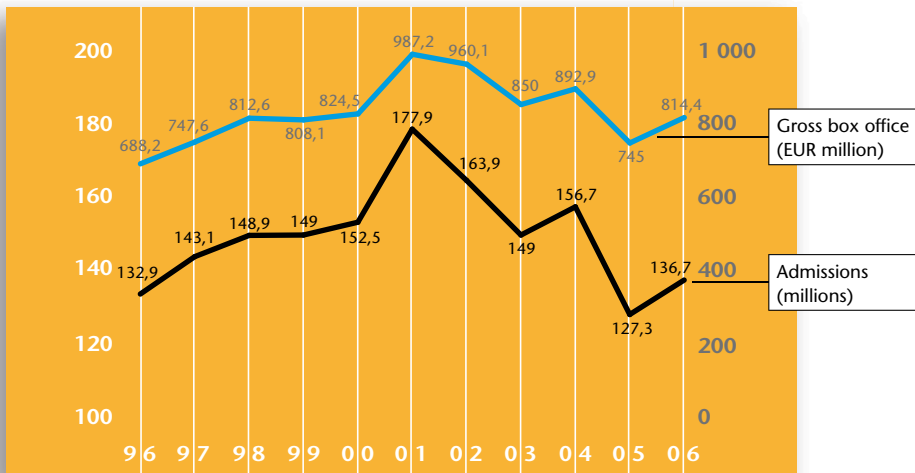
Number of German feature films on first release | 1996-2006

Source: SPIO



Admissions and gross box office | 1996-2006

Source: FFA



Top 20 films by admissions in Germany | 2006

	Original title	Distributor	Country of origin	Director	Admissions
1	Ice Age: The Meltdown	Fox	US	Carlos Saldanha	8 732 937
2	Pirates of the Caribbean: Dead...	BVI	US	Gore Verbinski	7 144 061
3	The Da Vinci Code	SPRI	US/GB inc	Ron Howard	5 638 982
4	Perfume: The Story of a Murderer	Constantin	DE/FR/ES	Tom Tykwer	5 480 675
5	Casino Royale ⁽¹⁾	SPRI	GB inc/US/DE/CZ	Martin Campbell	4 598 361
6	Deutschland. Ein Sommermärchen ⁽¹⁾	Kinowelt	DE	Sönke Wortmann	3 991 913
7	7 Zwerge - Der Wald ist nicht... ⁽¹⁾	UIP	DE	Sven Unterwaldt Jr.	3 509 341
8	Over the Hedge	UIP	US	Johnson & Kirkpatrick	3 410 486
9	The Devil Wears Prada ⁽¹⁾	Fox	US	David Frankel	2 877 642
10	Cars ⁽¹⁾	BVI	US	John Lasseter	2 204 816
11	Die Wilden Kerle 3	BVI	DE	Joachim Masannek	2 126 633
12	Hui Buh	Constantin	DE	Sebastian Niemann	2 022 988
13	Chicken Little	BVI	US	Mark Dindal	1 991 769
14	Das Leben der Anderen ⁽¹⁾	BVI	DE	F. H. von Donnermarck	1 678 572
15	Walk the Line	Fox	US	James Mangold	1 651 558
16	Borat ⁽¹⁾	Fox	US	Larry Charles	1 624 288
17	X-Men: The Last Stand	Fox	US	Brett Ratner	1 594 223
18	Brokeback Mountain	Tobis	US	Ang Lee	1 371 668
19	Scary Movie 4	BVI	US	David Zucker	1 346 310
20	Garfield: A Tail of Two Kitties	Fox	US/GB inc	Tim Hill	1 292 589

(1) Still on release in 2007.

Source: FFA

Production and distribution

The number of new German films released increased significantly in 2006, rising from 146 to 174. While the number of international co-productions released remained stable, the number of entirely German fiction features climbed from 60 to 78 (+ 30%). This can partly be explained by an increase in the number of very low budget films actually obtaining a theatrical release.

With a total of 136.7 million admissions (127.3 million in 2005), cinema attendance registered positive growth of 7.4%. Box office takings rose by 9.3% from EUR 745 million to EUR 814.4 million. However the excellent market share registered for German films was probably the most noteworthy feature of 2006: 25.8% as compared to 17.1% in 2005 and 23.8% in 2004, already an exceptional year thanks to *Good Bye, Lenin!* The overall number of tickets sold for German films was nonetheless slightly lower in 2006 than in 2004: 34.7 million for 36.7. This can perhaps be explained by the greater diversity of films on offer in 2006: *Perfume's* success was built on that of Patrick Süskind's bestseller; *Deutschland. Ein Sommermärchen* followed the national football team during the 2006 World Cup; *7 Zwerge - Der Wald ist nicht genug* is a spin-off from a 2004 comedy, itself a very loose adaptation of *Snow*

White; Das Leben der Anderen, Florian Henckel von Donnermarck's drama on the secret police in East Germany, was not only a domestic success but also won three European Film Awards and the Oscar for Best Foreign Language Film.

A new fund

One of the major events of 2006 was the creation of a new fund, the Deutsche Filmförderfonds (DFFF). Under the new scheme, funding will be allocated to feature films with total production costs of EUR 1 million or more, as well as documentary and animation films costing at least EUR 200,000 and EUR 3 million respectively. The amount of funding provided for each film will be between 16% and 20% of the production costs spent in Germany (the «German spend»), up to a maximum of EUR 4 million (or a maximum of EUR 10 million on request).

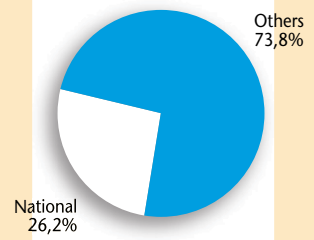
Applicants must be film producers whose residence or business headquarters are in Germany, or who at least have an office there, and who are providing at least 15% of the production costs out of their own pocket. The film itself must fulfil certain cultural criteria in accordance with a specially developed test.

Sources: FFA/SPIO

Italy

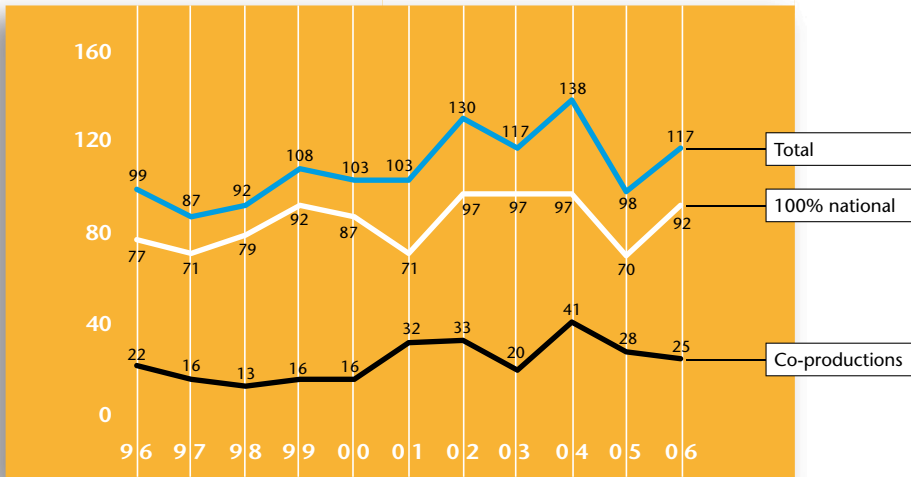
Population 2006	58,8 million
GDP 2005	1 678 billion USD
1 USD	0,75 EUR (March 2007)
Admissions 2006 est	107,3 million
Average admissions/capita 2006 est	1,83
Average ticket price 2006 est	5,70 EUR (= 7,15 USD)
Screens 2005	3 280
Screens in multiplexes 2005	25,0%
Admissions in multiplexes 2005	39,5%

Market shares 2006 est



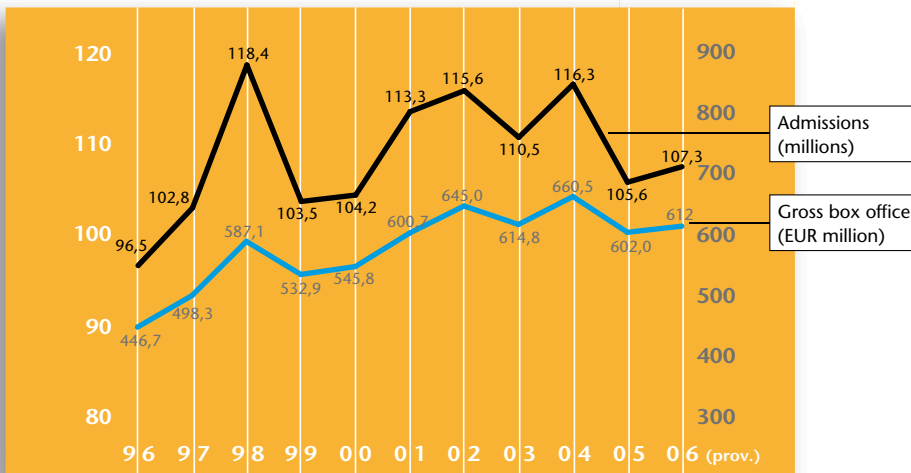
Number of feature films produced in Italy | 1996-2006

Sources: ANICA (1996-1999)/OIA (2000-2006)



Admissions and gross box office | 1996-2006

Sources: SIAE/OIA



Top 20 films by admissions in Italy | 2006

	Original title	Distributor	Country of origin	Director	Admissions
1	The Da Vinci Code	Sony	US/GB inc	Ron Howard	4 688 765
2	Pirates of the Caribbean: Dead...	Buena Vista	US	Gore Verbinski	3 302 016
3	Il mio miglior nemico	Filmauro	IT	Carlo Verdone	3 172 727
4	Ice Age: The Meltdown	20th C Fox	US	Carlos Saldanha	3 114 464
5	Natale a New York ⁽¹⁾	Filmauro	IT	Neri Parenti	2 947 812
6	The Devil Wears Prada	20th C Fox	US	David Frankel	2 322 359
7	Cars	Buena Vista	US	John Lasseter	2 272 718
8	Notte prima degli esami	01 Distribution	IT	Fausto Brizzi	2 145 283
9	Match Point	Medusa	GB inc/US/LU	Woody Allen	1 556 444
10	Ti amo in tutte le lingue del mondo ⁽²⁾	Medusa	IT	Leonardo Pieraccioni	1 553 365
11	Chronicles of Narnia I ⁽³⁾	Buena Vista	US/NZ inc	Andrew Adamson	1 468 942
12	The Departed	Medusa	US	Martin Scorsese	1 436 478
13	Scary Movie 4	Buena Vista	US	David Zucker	1 204 291
14	Il Caimano	Sacher Distrib.	IT	Nanni Moretti	1 201 773
15	Over the Hedge	UIP	US	Johnson & Kirkpatrick	1 176 787
16	Volver	Warner	ES	Pedro Almodóvar	1 176 309
17	Inside Man	UIP	US	Spike Lee	1 173 595
18	Eccezzzionale ...veramente capitol...	01 Distribution	IT	Carlo Vanzina	1 138 915
19	Amplagghed al cinema ⁽¹⁾	Medusa	IT/CH	Brachetti & Gaspari	1 063 180
20	Eragon ⁽¹⁾	20th C Fox	US/GB	Stefen Fangmeier	1 043 139

(1) Still on release in 2007.

(2) 1 822 253 in 2005.

(3) 1 360 872 in 2005.

Source: Cinetel

Distribution

In 2005 Italy had been one of the markets less affected by the prevailing negative trend. Perhaps as a result, the recovery noted in 2006 was less pronounced in Italy. Both admissions and box office returns showed minimal growth, with cinema attendance going from 105.6 million tickets sold in 2005 to an estimated 107.3 million in 2006 (+1.6%). Box office receipts grew by just 1.7%.

National films registered a market share of 26.2%, just superior to the share of 25.7% recorded in 2005. As always Christmas comedies made an important contribution to boosting admissions to locally-produced titles, with the 2006 offering, *Natale a New York*, at 5th place in the annual listing. Top ranked national film was another comedy, *Il mio miglior nemico*, which sold 3.2 million tickets and reached 3rd place overall. Worth noting are the excellent performances of Woody Allen's *Match Point*, at 9th place, Nanni Moretti's satire *Il Caimano* at 14th rank and Pedro Almodóvar's *Volver* at 16th position.

Production

After a lean year in 2005, Italian film production showed renewed vitality in 2006. A total of 117 films were produced, a figure identical to that of 2003, but inferior to the record level registered in 2004 (138 films). An increase in the number of entirely national films produced was principally responsible for growth (92 in 2006 as opposed to 70 in 2005) while the number of co-productions remained relatively unchanged, with just 3 less than in 2005.

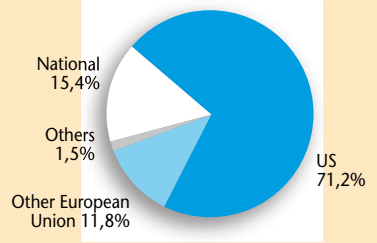
In March 2007 the Piedmont region announced details of a new film fund worth EUR 25 million for projects spending at least 20 to 25% of their budgets in the area. This new fund joins a documentary film fund started earlier in 2007 and jointly run by the Turin Piedmont region and the Turin Film Commission.

Sources: OIA/ANICA/Cinetel/
Giornale dello Spettacolo/
Screen International

Spain

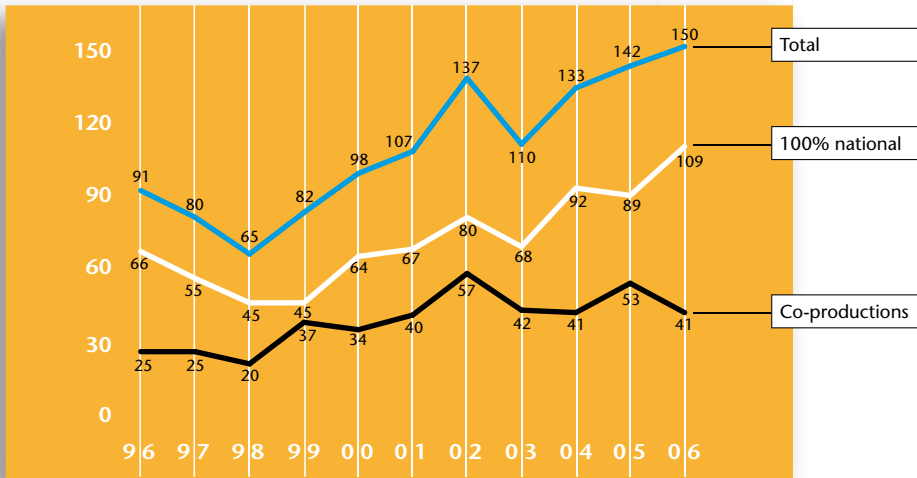
Population 2006	44,7 million
GDP 2005	1 125 billion USD
1 USD	0,75 EUR (March 2007)
Admissions 2006	121,7 million
Average admissions/capita 2006	2,72
Average ticket price 2006	5,23 EUR (= 6,50 USD)
Screens 2006	4 299
Admissions in multiplexes 2005	71,7%

Market shares 2006 prov.



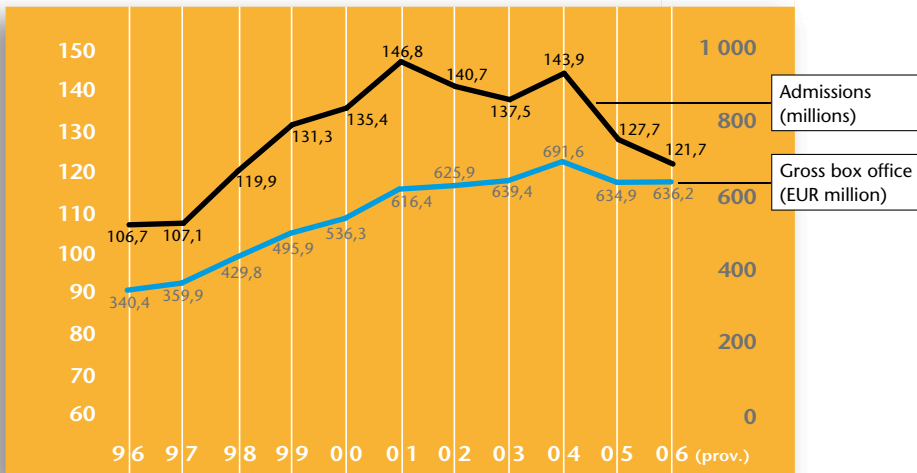
Number of feature films produced in Spain | 1996-2006

Source: ICAA



Admissions and gross box office | 1996-2006

Source: ICAA



Top 20 films by admissions in Spain | 2006

Provisional ranking.

	Original title	Distributor	Country of origin	Director	Admissions
1	Pirates of the Caribbean: Dead...	Walt Disney	US	Gore Verbinski	5 411 994
2	The Da Vinci Code	Sony	US/GB inc	Ron Howard	5 060 036
3	Ice Age: The Meltdown	Fox	US	Carlos Saldanha	3 706 200
4	Alatriste	Fox	ES	Agustín Díaz Yanes	3 130 710
5	Cars	Walt Disney	US	John Lasseter	2 540 739
6	Memoirs of a Geisha	Sony	US	Rob Marshall	2 251 601
7	Volver	Warner	ES	Pedro Almodóvar	1 903 583
8	X-Men: The Last Stand	Fox	US	Brett Ratner	1 833 797
9	Superman Returns	Warner	US/AU inc	Bryan Singer	1 790 588
10	The Departed ⁽¹⁾	Warner	US	Martin Scorsese	1 542 526
11	Crash	Manga	US/DE	Paul Haggis	1 524 549
12	Casino Royale ⁽¹⁾	Sony	GB inc/US/DE/CZ	Martin Campbell	1 497 761
13	Eragon ⁽¹⁾	Fox	US/GB	Stefen Fangmeier	1 386 869
14	Brokeback Mountain	UPI	US	Ang Lee	1 366 124
15	The Pink Panther	Fox	US	Shawn Levy	1 357 466
16	El Laberinto del Fauno ⁽¹⁾	Warner	ES/MX	Guillermo del Toro	1 346 853
17	Garfield: A Tail of Two Kitties	Fox	US/GB inc	Tim Hill	1 324 053
18	Mission: Impossible III	UPI	US/DE	J.J. Abrams	1 320 207
19	Poseidon	Warner	US	Wolfgang Petersen	1 301 948
20	Deja Vu ⁽¹⁾	Walt Disney	US	Tony Scott	1 258 392

(1) Still on release in 2007.

Source: ICAA

Production

150 feature films were produced in Spain in 2006, the highest figure of the last twenty-five years. 40 documentaries and 8 animation features were included in the total. The ICAA explains that an increase in public funding and greater involvement by broadcasters in the financing of films underpin increased production levels. The number of international co-productions fell, however, going from 53 films in 2005 to 41 in 2006.

A vital contributing element to the positive trend in the number of film produced is the agreement between the ICAA and public credit institution ICO, making available almost EUR 40 million in loans at favourable interest rates. Private investment levels have also swelled with 183 different companies involved in production in 2006, but only 45 of them involved in the production of more than two films.

Distribution

Cinema attendance decreased by 4.7% from 127.64 million in 2005 to 121.65 million in 2006. Box office revenues, however, showed a small increase, going from EUR 634.95 million to EUR 636.16 million. The market share for national

films also shrank slightly, from 16.7% of admissions in 2005 to 15.4 % in 2006. Swashbuckling adventure *Alatriste*, directed by Agustín Díaz Yanes, was the most popular domestic title with 3.1 millions tickets sold, while *Volver* recorded a total of 1.9 millions admissions. In its first year of release Pedro Almodóvar's film earned an excellent provisional total of 7.5 million admissions in the European Union, close to the cumulative 7.7 million registered by *Todo sobre mi madre* after 7 years of exhibition.

A new law in preparation

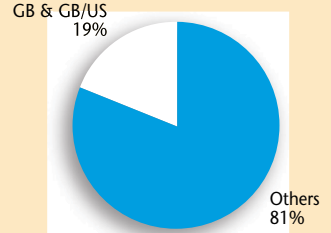
The Spanish Ministry of Culture is currently preparing a new draft law on cinematography, giving rise to impassioned debate between the various branches of the industry. The chief points of contention concern the prolongation of the current screen quota for Spanish and European films, unpopular with exhibitors, and the proposed increase (from 5 to 6%) of the mandatory contribution of revenue by broadcasters. On 23 March 2007 the Spanish government announced the postponement of the project and the opening of a new round of negotiations with professional organisations.

Sources: ICAA/Cine&Tele Informe

United Kingdom

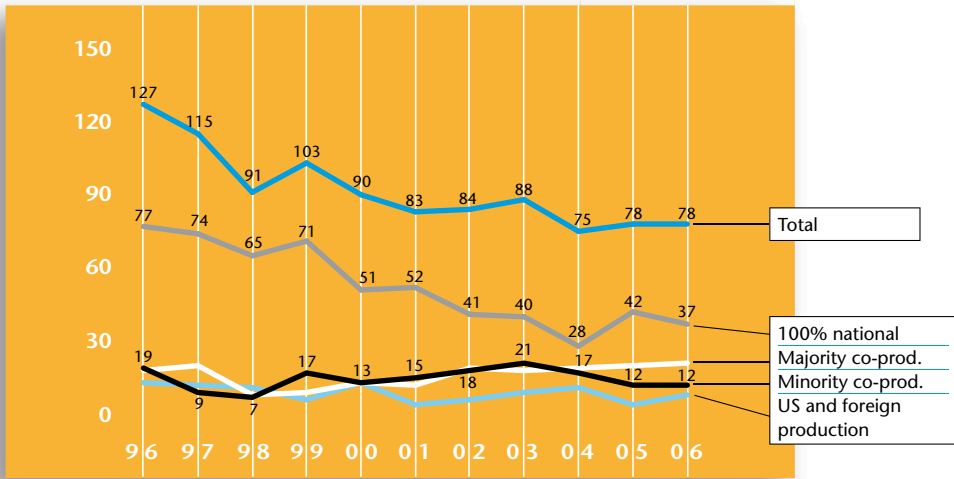
Population 2005	60,2 million
GDP 2005	2 229 billion USD
1 USD	0,51 GBP (March 2007)
Admissions 2006	156,6 million
Average admissions/capita 2006	2,60
Average ticket price 2006	4,87 GBP (= 9,55 USD)
Screens 2006	3 569
Screens in multiplexes 2005	65,3%

UK & Ireland market shares 2006 est



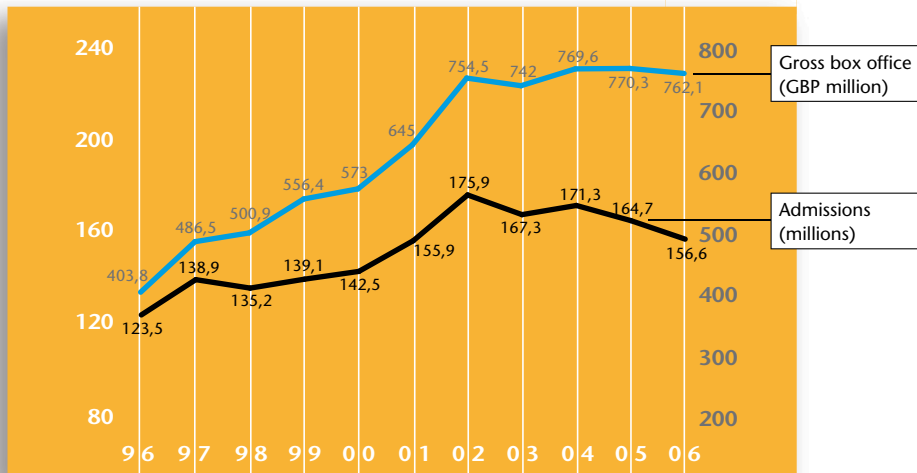
Number of feature films produced in the United Kingdom | 1996-2006

Source: Screen Finance



Admissions and gross box office | 1996-2006

Source: CAA



Top 20 films by gross box office in the United Kingdom and Ireland | 2006

	Original title	Distributor	Country of origin	Director	Gross box office (GBP)
1	Pirates of the Caribbean: Dead...	BVI	US	Gore Verbinski	52 515 550
2	Casino Royale ⁽¹⁾	Sony	GB inc/US/DE/CZ	Martin Campbell	50 734 856
3	The Da Vinci Code	Sony	US/GB inc	Ron Howard	30 424 412
4	Ice Age: The Meltdown	Fox	US	Carlos Saldanha	29 597 215
5	Borat ⁽¹⁾	Fox	US	Larry Charles	23 995 890
6	X-Men: The Last Stand	Fox	US	Brett Ratner	19 222 154
7	Cars	BVI	US	John Lasseter	16 447 561
8	Superman Returns	Warner	US/AU inc	Bryan Singer	16 124 112
9	Mission: Impossible III	UIP	US/DE	J.J. Abrams	15 450 527
10	Happy Feet ⁽¹⁾	Warner	AU/US	George Miller	15 340 314
11	The Devil Wears Prada	Fox	US	David Frankel	14 016 506
12	Chicken Little	BVI	US	Mark Dindal	13 509 094
13	Over the Hedge	UIP	US	Johnson & Kirkpatrick	13 220 800
14	The Departed ⁽¹⁾	Entertainment	US	Martin Scorsese	12 750 122
15	The Holiday ⁽¹⁾	Universal	US	Nancy Meyers	11 033 871
16	Night at the Museum ⁽¹⁾	Fox	US	Shawn Levy	10 970 285
17	The Break-Up	UIP	US	Peyton Reed	10 378 235
18	Walk the Line	Fox	US	James Mangold	10 356 908
19	Brokeback Mountain	Entertainment	US	Ang Lee	10 083 223
20	Flushed Away ⁽¹⁾	Paramount	GB inc/US	Bowers & Fell	9 238 519

(1) Still on release in 2007.

Source: UK Film Council/Nielsen EDI

Production

Data from Screen Finance on the number of films starts shows a total of 78 films going into production in 2006, a result identical to that registered in 2005. The number of entirely national films commencing principal photography fell slightly, from 42 to 37, a drop that was compensated for by an increase in the number of US films shooting in the United Kingdom (from 4 to 8).

Compiled using different methodology, data from UK Film Council International shows production activity recovering in 2006, after a dip in 2005. The total value of UK production (including inward investment) grew by 46%, reaching GBP 842.4 million, making 2006 the second highest production year on record after 2003. Principal areas of growth were inward investment films whose total value went from GBP 308.7 million to 569.6 million, and domestic features, whose number went from 39 to 50. The increase in the number of entirely UK features and the accompanying decrease in UK co-productions (down by 10 films) is a trend likely to strengthen as the new tax rules for production take full effect in 2007.

Features of the new scheme include tax relief based on UK spend and no longer on total production budget, together with the necessity for films to pass a cultural test in order to qualify. A new unit set up within the UK Film Council will take charge of administering this test.

Distribution and exhibition

In 2005 the UK had been one of the European countries least affected by the prevailing downward trend in admissions and box office. 2006 results show the market remaining relatively flat, with box office takings of GBP 762.1 million, a 1.1% drop on 2005, and admissions down by 4.9%, a more significant shrinkage. The early part of the year was particularly slow, with a small improvement on the release of *Ice Age: The Meltdown* in April, but a combination of good weather and the World Cup (during which period distributors held back major titles) depressed results heavily in June. The second half of the year was more consistent, with 8 out of the top 20 films released in the last quarter of the year.

Sources: CAA/Screen Finance/UK Film Council

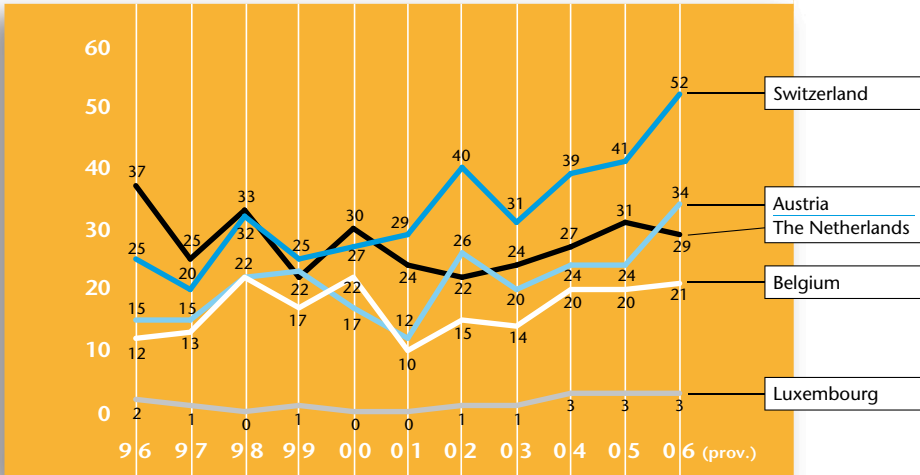
Austria - Benelux - Switzerland

	Austria	Belgium	Switzerland	Luxembourg	Netherlands
Population 2005 (millions)	8,19	10,42	7,25	0,46	16,3
GDP 2005 (USD billions)	305	371	367	36	629
1USD (April 2007)	0,75 EUR	0,75 EUR	1,22 CHF	0,75 EUR	0,75 EUR
Admissions 2006 (millions)	17,3	23,8	16,4	1,24	22,5
Admissions/capita 2006	2,1	2,3	2,3	2,7	1,4
Screens 2006	576	503 ⁽¹⁾	547	24 ⁽¹⁾	625 ⁽¹⁾
Share national films 2006	-	6,0%	9,5%	-	10,9%

(1) 2005

Number of feature films produced in Austria, Belgium, Luxembourg, the Netherlands and Switzerland | 1996-2006

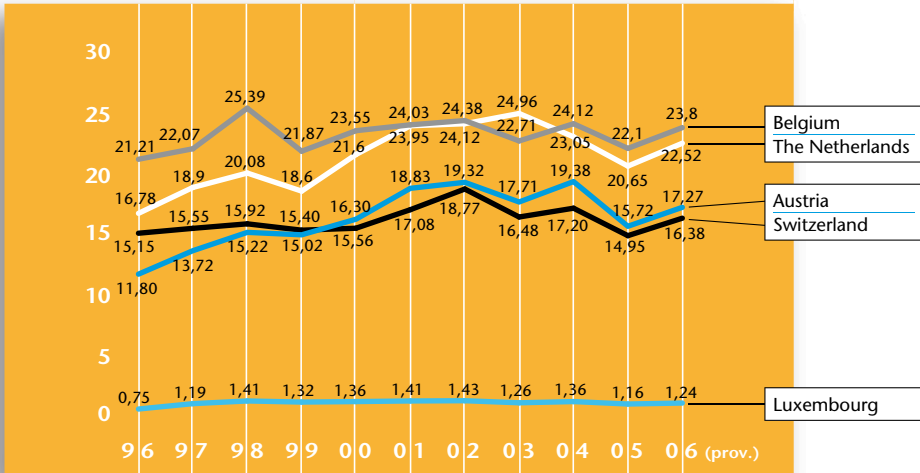
Sources: FAF/OFS/NFF/MFB/CNA/OBS



Admissions in Austria, Belgium, Luxembourg, the Netherlands and Switzerland | 1996-2006

In millions.

Sources: INS/FCB/NVF-NVB/OFS/FAF/STATEC/OBS



Top 20 films by admissions in Belgium, Luxembourg and the Netherlands | 2006

Original title	Belgium	Luxembourg ⁽¹⁾	Netherlands	Total
1 Pirates of the Caribbean: Dead Man's Chest	1 187 729	46 100	1 492 700	2 726 529
2 Ice Age: The Meltdown	1 131 122	52 600	964 440	2 148 162
3 The Da Vinci Code	850 357	42 200	1 085 514	1 978 071
4 Casino Royale ⁽²⁾	540 444	35 200	808 530	1 384 174
5 Zwartboek	34 168	–	984 066	1 018 234
6 Cars	379 323	23 900	469 537	872 760
7 Happy Feet	258 034	13 100	556 216	827 350
8 The Devil Wears Prada	361 367	22 100	424 068	807 535
9 Over the Hedge	394 016	20 700	360 595	775 311
10 Garfield: A Tail of Two Kitties	420 315	16 100	329 684	766 099
11 Step Up	275 040	8 600	426 391	710 031
12 Borat	337 517	16 400	320 523	674 440
13 Mission: Impossible III	328 392	16 900	310 806	656 098
14 Nanny McPhee	299 176	15 900	287 400	602 476
15 Big Momma's House 2	298 820	–	289 351	588 171
16 X-Men: The Last Stand	340 913	13 000	225 628	579 541
17 Les Bronzés 3: amis pour la vie	546 173	14 400	–	560 573
18 Inside Man	295 650	14 400	241 574	551 624
19 The Chronicles of Narnia: The Lion, the Witch...	–	15 700	524 696	540 396
20 The Holiday	250 000	–	287 426	537 426

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

(2) Still on release in 2007.

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

Top 20 films by admissions in Austria and Switzerland | 2006

Original title	Country of origin	Austria ⁽¹⁾	Switzerland	Total
1 Ice Age: The Meltdown	US	1 197 007	1 045 926	2 242 933
2 Pirates of the Caribbean: Dead...	US	882 087	672 717	1 554 804
3 The Da Vinci Code	US/GB inc	739 337	601 341	1 340 678
4 Casino Royale ⁽²⁾	GB inc/US/DE/CZ	576 164	729 909	1 306 073
5 Perfume: The Story of a Murderer	DE/FR/ES	598 884	389 259	988 143
6 The Devil Wears Prada	US	409 098	326 854	735 952
7 Over the Hedge	US	410 521	250 766	661 287
8 7 Zwerge - Der Wald ist nicht genug ⁽²⁾	DE	467 919	157 003	624 922
9 Cars	US	396 010	227 751	623 761
10 Chicken Little ⁽²⁾	US	321 289	159 986	481 275
11 Garfield: A Tail of Two Kitties	US/GB inc	254 075	204 014	458 089
12 Brokeback Mountain	US	140 347	261 294	401 641
13 Inside Man	US	116 691	215 676	389 935
14 Borat ⁽²⁾	US	174 259	208 747	383 006
15 Mission: Impossible III	US/DE	205 023	175 479	380 502
16 Die Herbstzeitlosen	CH	–	374 749	374 749
17 Grounding	CH	–	370 957	370 957
18 Walk the Line	US	191 164	155 321	346 485
19 Volver	ES	90 768	227 970	388 531
20 Happy Feet	AU/US	160 561	174 519	335 080

(1) Provisional data.

(2) Still on release in 2007.

Sources: FAFÖ/OFS

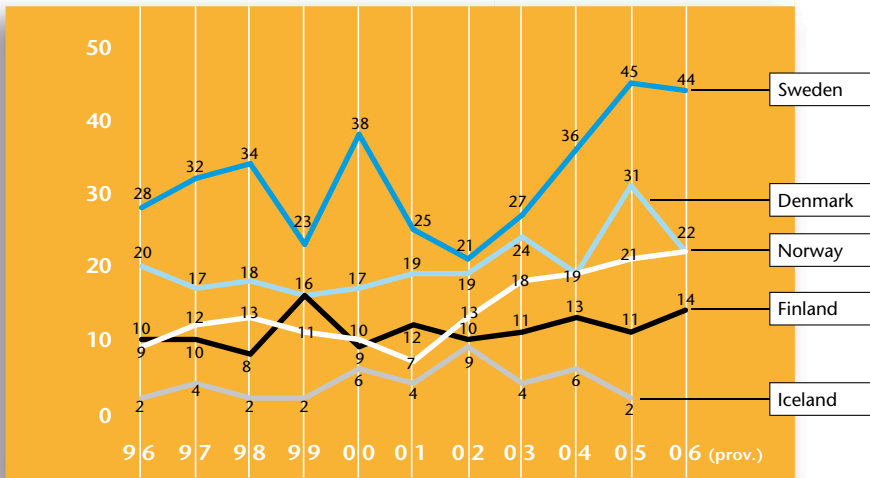
Nordic countries

	Denmark	Finland	Iceland	Norway	Sweden
Population 2005 (millions)	5,4	5,3	0,3	4,6	9,0
GDP 2005 (USD billions)	259	196	16	296	358
1 USD (April 2007)	5,58 DKK	0,75 EUR	66,6 ISK	6,10 NOK	6,94 SEK
Admissions 2006 (millions)	12,6	6,7	1,4 ⁽¹⁾	11,9	15,3
Admissions/capita 2006	2,3	1,3	4,8 ⁽¹⁾	2,6	1,7
Screens 2006	385	332	45 ⁽¹⁾	432 ⁽¹⁾	1 171
Screens in multiplexes 2005	19,8%	13,0%	13,3%	12,9%	15,0%
Admissions in multiplexes 2005	31,8% ⁽²⁾	45,8%	–	32,6%	–
Share national films 2006	24,8%	22,6%	3,5% ⁽¹⁾	16,1%	18,8%

(1) 2005 (2) 2003

Number of feature films produced in the Nordic countries | 1996-2006

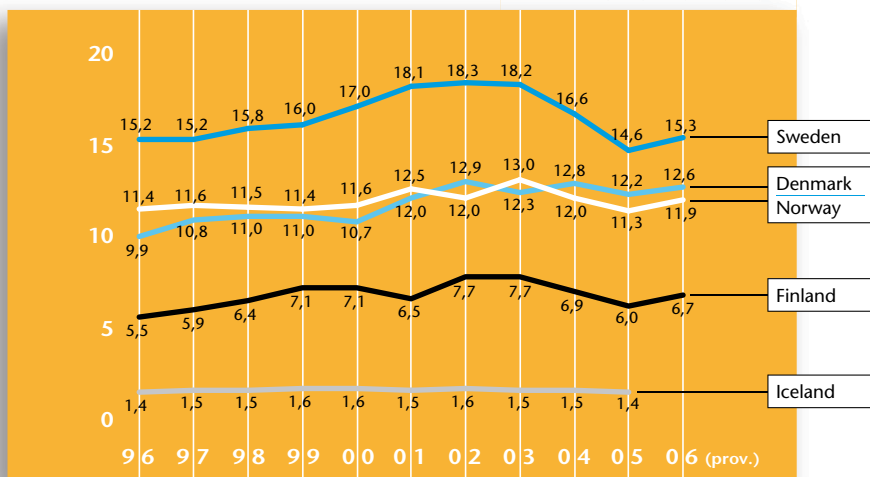
Sources: DFI/FFF/HI/NFF/SFI/OBS



Admissions in Nordic countries | 1996-2006

In millions.

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



Top 10 films by admissions in Denmark | 2006

	Original title	Distributor	Country of origin	Director	Admissions
1	Casino Royale ⁽¹⁾	Nordisk ⁽³⁾	GB inc/US/DE/CZ	Martin Campbell	703 946
2	The Da Vinci Code	Nordisk ⁽³⁾	US/GB inc	Ron Howard	623 989
3	Ice Age: The Meltdown	SF-Film	US	Carlos Saldanha	605 349
4	Pirates of the Caribbean: Dead...	UIP	US	Gore Verbinski	517 805
5	Drømmen	Nordisk ⁽³⁾	DK/GB	Niels Arden Oplev	404 703
6	Efter brylluppet	Nordisk ⁽³⁾	DK/GB	Susanne Bier	386 444
7	Chicken Little	UIP	US	Mark Dindal	291 559
8	The Chronicles of Narnia ⁽²⁾	UIP	US/NZ inc	Andrew Adamson	287 694
9	Sprængfarlig bombe	Nordisk ⁽³⁾	DK	Tomas Villum Jensen	272 068
10	Cars	UIP	US	John Lasseter	267 755

(1) Still on release in 2007. (2) 180 535 admissions in 2005. (3) Nordisk, Constantin, Fox. Sources: Danmarks Statistics/DFI

Top 10 films by admissions in Finland | 2006

	Original title	Distributor	Country of origin	Director	Admissions
1	Matti	Buena Vista	FI	Aleksi Mäkelä	461 665
2	Pirates of the Caribbean: Dead...	Buena Vista	US	Gore Verbinski	458 655
3	Casino Royale	Nordisk	GB inc/US/DE/CZ	Martin Campbell	368 621
4	The Da Vinci Code	Nordisk	US/GB inc	Ron Howard	365 276
5	Ice Age: The Meltdown	FS Film	US	Carlos Saldanha	272 104
6	Cars	Buena Vista	US	John Lasseter	232 049
7	Kummelin jackpot	Buena Vista	FI	Pekka Karjalainen	229 385
8	FC Venus ⁽¹⁾	Nordisk	FI	Joonas Tena	223 449
9	Chicken Little	Buena Vista	US	Mark Dindal	126 743
10	The Devil Wears Prada	FS Film	US	David Frankel	116 518

(1) 14 118 admissions in 2005.

Source: FFF

Top 10 films by admissions in Norway | 2006

	Original title	Distributor	Country of origin	Director	Admissions
1	Ice Age: The Meltdown	20 th Century Fox	US	Carlos Saldanha	889 168
2	Pirates of the Caribbean: Dead...	Buena Vista	US	Gore Verbinski	664 816
3	Casino Royale	Buena Vista	GB inc/US/DE/CZ	Martin Campbell	466 884
4	The Da Vinci Code	Nordisk	US/GB inc	Ron Howard	442 559
5	Cars	Buena Vista	US	John Lasseter	375 527
6	Over the Hedge	UIP	US	Johnson & Kirkpatrick	370 508
7	Chicken Little	Buena Vista	US	Mark Dindal	336 204
8	The Chronicles of Narnia ⁽¹⁾	Buena Vista	US/NZ inc	Andrew Adamson	328 765
9	Lange flate ballær	SF Norge	NO	Bjørn Fast Nagell	258 407
10	Fritt vilt	SF Norge	NO	Roar Uthaug	252 786

(1) 263 965 admissions in 2005.

Sources: Film og Kino/NFF

Top 10 films by admissions in Sweden | 2006

	Original title	Distributor	Country of origin	Director	Admissions
1	Pirates of the Caribbean: Dead...	Buena Vista	US	Gore Verbinski	1 134 745
2	The Da Vinci Code	Sony Pictures Rel.	US/GB inc	Ron Howard	654 437
3	Ice Age: The Meltdown	20th Century Fox	US	Carlos Saldanha	648 735
4	Casino Royale	Sony Pict. Rel.	GB inc/US/DE/CZ	Martin Campbell	618 860
5	The Chronicles of Narnia ⁽¹⁾	Buena Vista	US/NZ inc	Andrew Adamson	580 310
6	Chicken Little	Buena Vista	US	Mark Dindal	504 595
7	Heartbreak Hotel	SF Film	SE/GB	Colin Nutley	462 820
8	Borat	20th Century Fox	US	Larry Charles	410 185
9	Cars	Buena Vista	US	John Lasseter	359 511
10	The Devil Wears Prada	20th Century Fox	US	David Frankel	322 444

(1) 416 930 in 2005.

Source: SFI

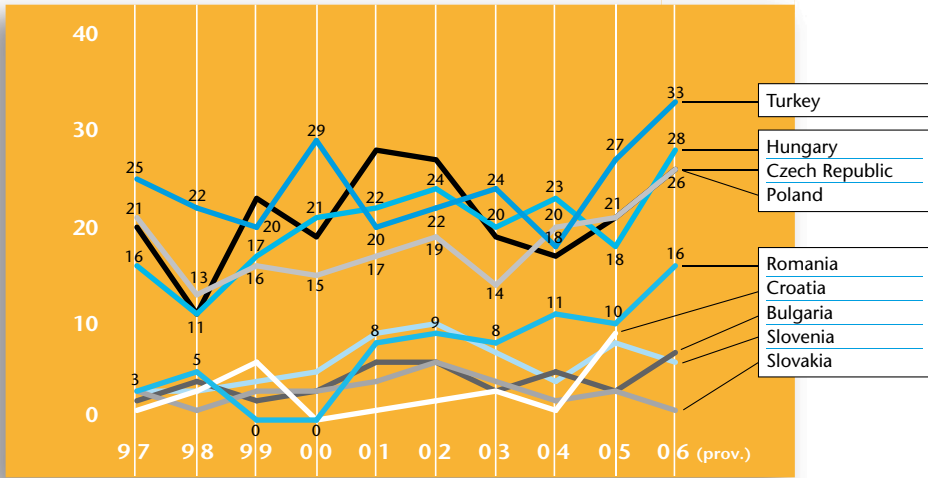
Central and South-Eastern Europe

	Bulgaria	Croatia	Czech Republic	Hungary	Poland	Romania	Slovakia	Slovenia	Turkey
Population 2005 (millions)	7,7	4,6	10,2	10,1	38,5	21,7	5,4	2,0	73,2
GDP 2005 (USD billions)	24	39	124	109	303	97	47	34	363
Admissions 2006 (millions)	2,4	2,2 ⁽¹⁾	11,5	11,7	32,0	2,8	3,4	2,7	34,8
Admissions/capita 2006	0,3	0,5 ⁽¹⁾	1,1	1,2	0,8	0,1	0,6	1,4	0,5
Screens 2006	127	123 ⁽¹⁾	667 ⁽¹⁾	431	937 ⁽¹⁾	108	245 ⁽¹⁾	106 ⁽¹⁾	1 299
Share national films 2006	0,69%	~	29,5%	18,7%	15,9%	4,27%	~	10,0%	51,8%

(1) 2005 Source: OBS

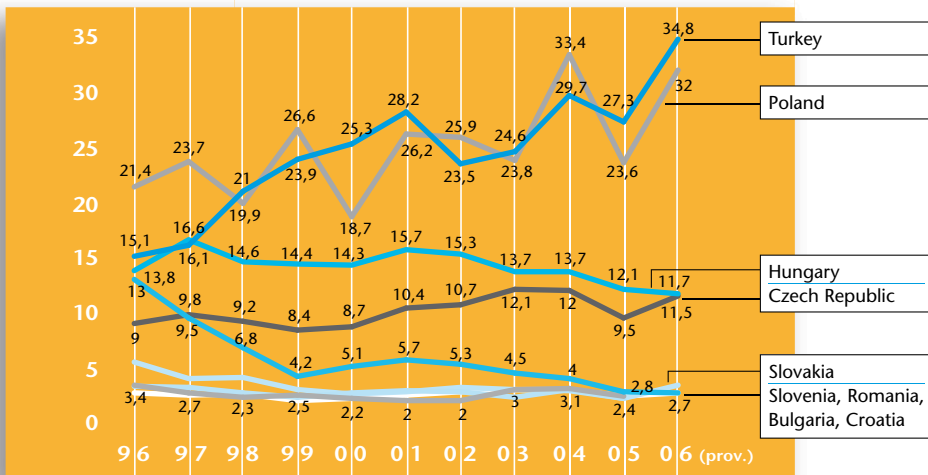
Number of feature films produced in Central and South-Eastern Europe | 1997-2006

Source: OBS



Admissions in Central and South-Eastern Europe | 1996-2006

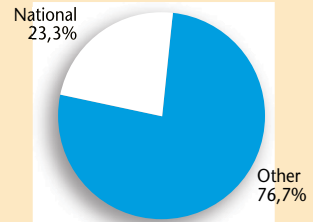
Sources: Sinema/BoxOffice.pl/NFO/UFD/CNC/NFC/SFF/AIC/CBS



Russian Federation

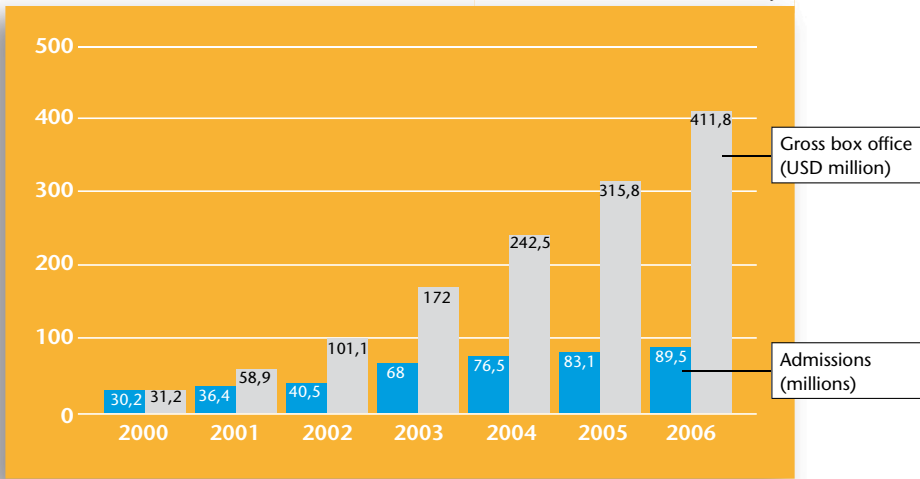
Population 2005	143,2 million
1 USD	26,0 RUB (March 2007)
Admissions 2006	89,5 million
Average admissions/capita 2006	0,63 est
Average urban ticket price 2006	4,6 USD est
National films released 2006	67
Modern urban cinemas 2006	615
Modern screens 2006	1 319

Market shares 2006



Admissions and gross box office in the Russian Federation | 2000-2006

Source: Russian Film Business Today



Note: Admissions and box office totals are estimates for the Russian Federation only.

Exhibition

An estimated 89.5 million cinema tickets were sold in the Russian Federation during the 2006 fiscal year, an increase of 7.7% on the 2005 total. Calendar year data for the CIS countries (excluding Ukraine) puts total 2006 admissions at 89.78 million for box office receipts of USD 421.9 million, an impressive 31% rise on the 2005 box office total of USD 321.6 million. Swelling box office returns were fuelled by rising average ticket prices, reaching USD 4.6 in 2006, up from USD 3.8 in the preceding year, while growth in admissions slowed slightly.

Distribution

305 films were released across the CIS countries during the year, of which 67 were locally

produced titles. The number one film of 2006 and the highest grossing film ever in the CIS was domestic production *Dnevnoy Dozor* (*Day Watch*). The sequel to *Nocnoj Dozor* (*Night Watch*) came in just ahead of the most successful US title, *Pirates of the Caribbean: Dead Man's Chest*. A second domestic sequel, *Bumer. Film vtoroy* (*Bimmer. Part Two*) also featured amongst the Top 5 films alongside *Ice Age: The Meltdown* and *The Da Vinci Code*.

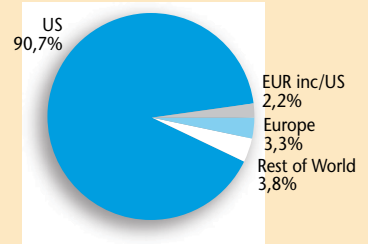
Top earning distributor was Gemini/20th Century Fox CIS, distributor of *Dnevnoy Dozor*, capturing 25.7% of total box office, with box office earnings up 37% on 2005, when the company was also the market leader. Second placed was Cascade (representing Sony and Buena Vista) with 23.5% of receipts (up from third place in 2005), well ahead of UIP at 13.1%.

Sources: Russian Film Business Today/Nevafilm

United States

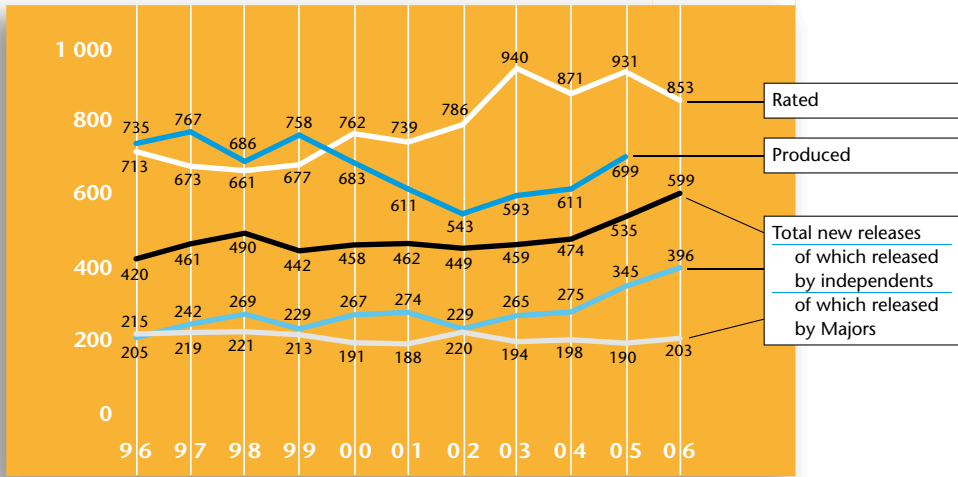
Population 2005	298 million
GDP 2005	12 455 billion USD
1 USD	0,75 EUR (April 2007)
Admissions 2005	1 449 million
Average admissions/capita 2006	4,8
Average ticket price 2006	6,55 USD
Screens 2005	38 852
- Indoor	38 143 (98%)
- Drive-in	709 (2%)

Market shares 2006



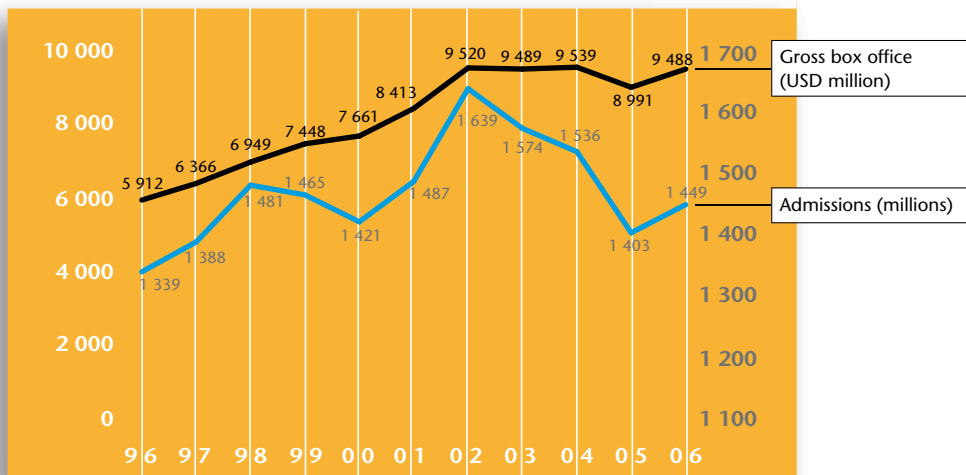
Number of films produced, rated and released in the United States | 1996-2006

Source: MPA



Admissions and gross box office | 1996-2006

Source: MPA



New releases

The number of new films released has grown steadily over the last few years, reaching an all-time high of 599 releases in 2006, compared to 535 in 2005. The number of films released by MPAA members grew to 203 (190 in 2005), while independent releases climbed from 345 in 2005 to 396 in 2006.

Admissions and box office

Total cinema attendance was 1.45 billion, up 3.3% in relation to 2005 (1.40 billion), bringing to an end a three-year decline with admissions now back at their 2000 level. Average admissions per capita remained stable, at 4.8 against 4.7 in 2005, a level similar to that of 1995. Box office revenues rose 5.5% to 9.49 billion USD (against 8.99 billion in 2005) and average ticket prices reached 6.55 USD in 2006 (6.41 in 2005).

Average theatrical costs

Average theatrical costs for MPAA members have shrunk by 5.5% since 2003. From 2005 to 2006, overall costs remained essentially flat, with negative costs rising 3.4% (from 63.6 million USD to 65.8 million) while marketing costs decreased by 4.4% (from USD 36.1 million to 34.5 million). Average theatrical costs for members' subsidiaries and affiliates (such as Fox Searchlight, Miramax, New Line and Sony Picture Classics) grew 22.7% over the same period. Negative costs were up 28.9% (30.3 million USD for 23.5 million in 2005), while negative costs were up 13.2% (17.2 million USD for 15.2 million in 2005). Analysis of marketing costs showed the increasing importance of the Internet and on-line advertising, accounting for 3.7% of total marketing expenditure, compared to 0.9% back in 2002. This rise has been at the expense of traditional media, in particular newspapers, whose share dropped from 13.6% in 2002 to 10.8% in 2006.

Distributor market shares

Though two Buena Vista-distributed films topped the box office charts (*Pirates of the Caribbean: Dead Man's Chest* and *Cars*), Sony Columbia was

the distributor to take the largest market share on the domestic market (18.6%), thanks to the success of *The Da Vinci Code* and *Casino Royale*. Buena Vista (16.2%) came in second followed by 20th Century Fox (15.2% - *X-Men: The Last Stand*), with the 2005 market leader, Warner Brothers (11.6% - *Superman Returns*), in 4th place. Sony claims first place for the third time in five years and obtains the highest single studio market share since 1997, when Sony Columbia claimed 20% of total receipts.

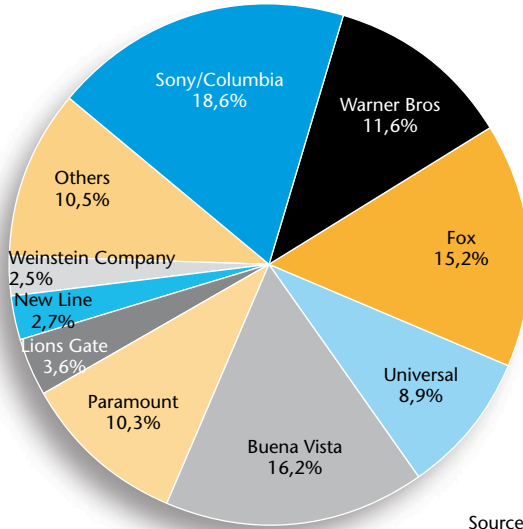
Digital cinemas

US exhibitors have shown a high rate of uptake of digital projection technology, with at least one regional chain now 100% digitised and a number of larger chains making important progress towards high levels of digitisation. Interest has now turned to the deployment of digital 3D cinema equipment. Carmike, a chain which had already equipped 1,000 of its screens with digital projection equipment, announced in early 2007 that it would equip 500 screens with the new format. Earlier, another US exhibition chain, Cinemark, also at the forefront in the deployment of digital equipment, announced that 150 of its screens would be fitted with digital 3D equipment. Digital 3D releases in 2006 included *Chicken Little* and *Monster House*, and press reports indicate that screen averages were considerably higher for the 3D screens than for others. Films to be released in the format in 2007 include *Meet the Robinsons* and *Beowulf*.

US exhibitors Regal, AMC/Loews and Cinemark also launched a new initiative, Digital Cinema Implementation Partners (DCIP), with the support of Warner Bros. and Universal Pictures, to evaluate the different methods of distributing digital films to cinemas. The idea is to identify the lowest-cost and most effective system for digital distribution, and to implement it. It is not intended that the new system be closed: other studios will be able to access it and at least one other studio has already expressed interest. First results are expected in early 2008.

Sources: MPAA/Box Office Mojo/Screen Digest/Variety

Distributors' market shares on the North American market | 2006

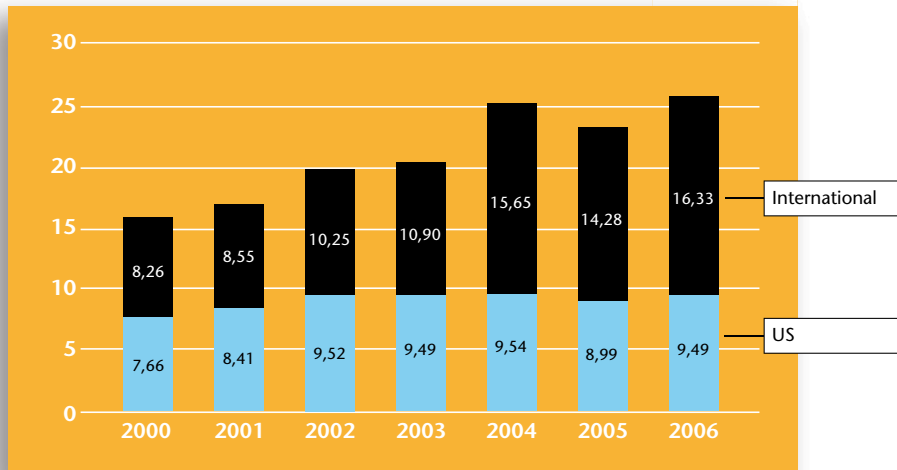


Source: Box Office Mojo

Worldwide box office revenues | 2006

USD billion.

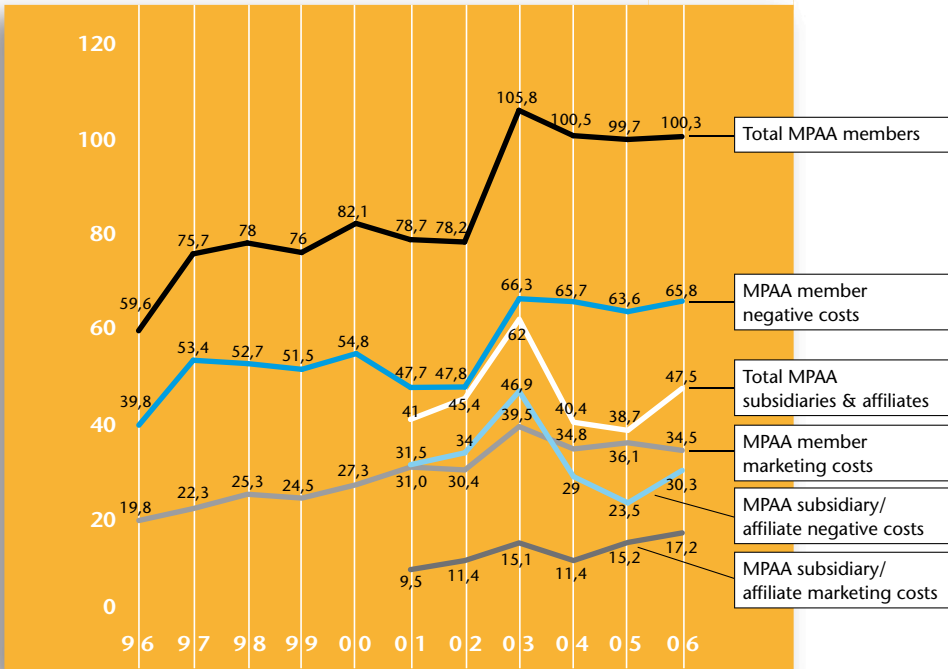
Source: MPAA



MPAA member companies average theatrical costs | 1996-2006

USD million.

Source: MPAA



Note: MGM data is no longer collected. Historical figures have been adjusted to reflect this omission.

Top 20 films by North American box office | 2006

Gross box office United States and Canada, in USD.

Original title	Country of origin	Distributor	Gross box office
1 Pirates of the Caribbean: Dead Man's Chest	US	Buena Vista	423 315 812
2 Cars	US	Buena Vista	244 082 982
3 X-Men: The Last Stand	US	20th Century Fox	234 362 462
4 The Da Vinci Code	US/GB inc	Sony	217 536 138
5 Superman Returns	US/AU inc	Warner	200 081 192
6 Ice Age: The Meltdown	US	20th Century Fox	195 330 621
7 Happy Feet ⁽¹⁾	AU/US	Warner	178 325 897
8 Over the Hedge	US	Paramount	155 019 340
9 Casino Royale ⁽¹⁾	GB inc/US/DE/CZ	Sony	154 944 794
10 Talledega Nights	US	Sony	148 213 377
11 Click	US	Sony	137 355 633
12 Mission: Impossible III	US/DE	Paramount	133 501 348
13 Night at the Museum ⁽¹⁾	US	20th Century Fox	127 286 780
14 Borat ⁽¹⁾	US	20th Century Fox	125 789 589
15 The Devil Wears Prada	US	20th Century Fox	124 740 460
16 The Departed ⁽¹⁾	US	Warner	120 476 289
17 The Break-Up	US	Universal	118 806 699
18 The Pursuit of Happyness ⁽¹⁾	US	Sony	104 510 417
19 Scary Movie 4	US	Weinstein Co.	90 710 620
20 Failure to Launch	US	Paramount	88 715 192

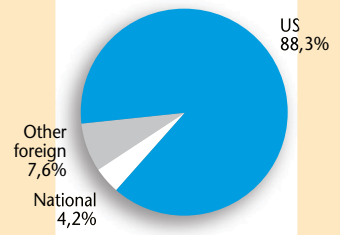
(1) Still on release in 2007.

Source: Variety

Canada

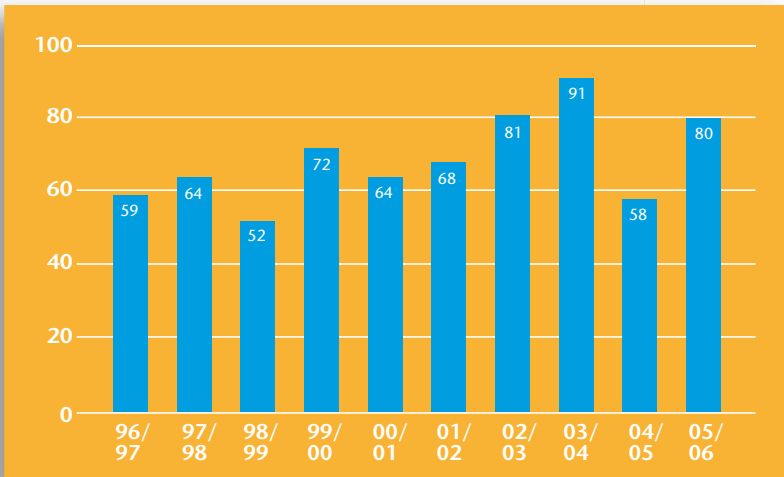
Population 2006	32,4 million
GDP 2005	992 billion USD
1 CAD	0,86 USD (March 2007)
Admissions 2004/2005	120,3 million
Average admissions/capita 2004/2005	3,8
Average ticket price 2004/2005	7,47 CAD (= 5,98 USD)
Screens 2004/2005	2 933
- In cinemas	2 842
- Drive-in	91

Market shares of box office 2006



Total number of Canadian theatrical films | 1996-2006

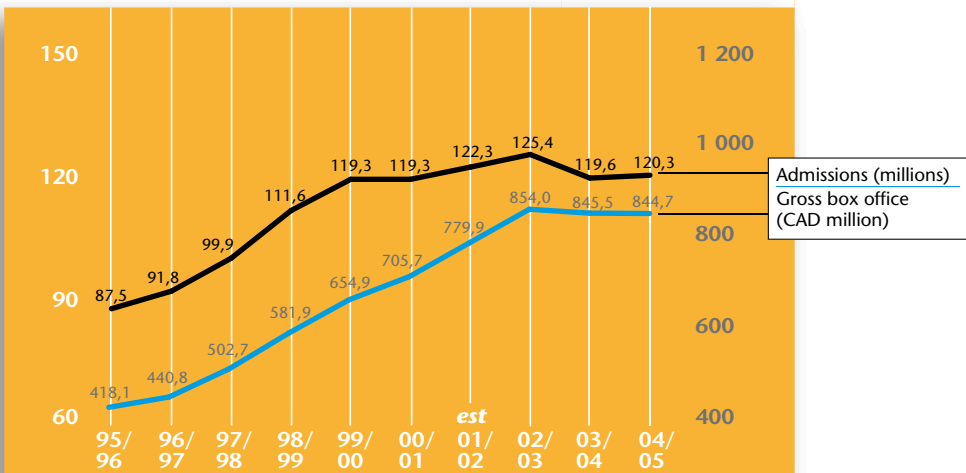
Source: CFTPA



Note: Estimates on the basis of CAVCO data.

Admissions and gross box office | 1995-2005

Source: Statistics Canada



Top 20 films by admissions in Quebec | 2006

	Original title	Country of origin	Year	Director	Admissions Quebec
1	Bon Cop, Bad Cop	CA(QC)	2006	Eric Canuel	1 318 801
2	The Da Vinci Code	US/GB inc	2006	Ron Howard	1 018 660
3	Pirates of the Caribbean: Dead...	US	2006	Gore Verbinski	1 017 653
4	Ice Age: The Meltdown	US	2006	Carlos Saldanha	764 530
5	Casino Royale	GB inc/US/DE/CZ	2006	Martin Campbell	551 759
6	Click	US/GB inc/DE	2006	Frank Coraci	507 145
7	Mission: Impossible III	US/DE	2006	J.J. Abrams	473 924
8	X-Men: The Last Stand	US	2006	Brett Ratner	457 309
9	Superman Returns	US/AU inc	2006	Bryan Singer	373 861
10	Eight Below	US	2006	Frank Marshall	352 412
11	Brokeback Mountain ⁽¹⁾	US	2005	Ang Lee	343 809
12	Cars	US	2006	John Lasseter	342 457
13	Le secret de ma mère	CA(QC)	2006	Ghyslaine Côté	302 254
14	Over the Hedge	US	2006	T. Johnson, K. Kirkpatrick	297 226
15	The Pink Panther	US	2006	Shawn Levy	286 842
16	King Kong ⁽²⁾	US/NZ inc	2005	Peter Jackson	280 360
17	The Departed	US	2006	Martin Scorsese	266 568
18	Scary Movie 4	US	2006	David Zucker	261 234
19	Take the Lead	US	2006	Liz Friedlander	245 705
20	Saw III	US	2006	Darren Lynn Bousman	240 002

(1) 40 474 admissions in 2005.

(2) 361 612 admissions in 2005.

Source: Observatoire de la culture et des communications du Québec

Exhibition and distribution

Cinema attendance picked up slightly in Canada in 2004/05, according to the Statistics Canada's Motion Picture Theatres Survey, after a 4.6% fall in the preceding period. The recovery in admissions was limited (+0.5%) however, and box office takings remained flat at CAD 844.7 million, a 0.1% decrease in relation to 2003/04. Data from the MPTAC shows a similar trend: box office for 2006 was CAD 831 million, a small drop in relation to 2005 (CAD 834 million). US films improved their performance, earning 88.3% of total Canadian box office, up from 85.5% in 2005, at the expense of Canadian films and films from other parts of the world. Locally-produced titles saw their share of box office shrink, from 5.5% in 2005 to 4.2% in 2006.

On the French-speaking market, a Quebec-produced bilingual title, *Bon Cop Bad Cop* was the best-selling film of the year, selling 1.3 million tickets, ahead of *The Da Vinci Code* and *Pirates of the Caribbean: Dead Man's Chest*. Only one further local title appeared in the Quebec Top 20, whereas in 2005 no less than six Quebec-made films had featured in the annual ranking. As a result, 2006 market share for locally produced titles fell back, from 18.9% of admissions in 2005 to 11.7% in 2006. Overall cinema attendance in the province also shrank in 2006, with a total of 24.7 million tickets sold (26.2 million in 2005).

Production

Figures published by the Canadian Film and Television Producers' Association (CFTPA) show that the overall value of film and television production in Canada recovered in 2005/06, having experienced a 9.7% drop in 2004/05. A total value of CAD 4.8 billion was recorded for 2005/06, up 5.8% in relation to the preceding period. Canadian theatrical production in particular experienced a revival, rising by CAD 139 million to CAD 323 million (+75%) and returning to levels close to those of 2003/04. Though treaty co-production continued to be affected by policy and regulatory changes in Europe (in particular within the UK), a larger number of higher-budgeted Canadian feature film productions, some of which were treaty co-productions, made a significant contribution to the recovery.

Having fallen by CAD 441 million in 2004/05, foreign location production in Canada also bounced back, reaching a total value of CAD 1.7 billion, up by CAD 203 million (+13.8%). Increases to the tax credit rates in several Canadian provinces since December 2004 certainly contributed to this result.

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

Latin America

	Argentina	Bolivia	Brazil	Chile	Colombia
Population 2005 (millions)	38,8	9,8	186,4	16,3	45,6
GDP 2005 (USD billions)	183	10	796	115	123
Screens 2005	978 ⁽¹⁾	48	2 045 ⁽¹⁾	296	447
Admissions 2006 (millions)	35,4	1,5 ⁽²⁾	90,3	9,9 ⁽²⁾	16,4 ⁽²⁾
Average admissions/capita 2006	1,0	0,2 ⁽²⁾	0,5	0,6 ⁽²⁾	0,4 ⁽²⁾

	Mexico	Peru	Uruguay	Venezuela
Population 2005 (millions)	107,0	28,0	3,5	26,8
GDP 2005 (USD billions)	768	79	17	109 ⁽³⁾
Screens 2005	3 682 ⁽¹⁾	217	90	394
Admissions 2006 (millions)	162,5 est	13,2 ⁽²⁾	2,4 ⁽²⁾	14,7 ⁽²⁾
Average admissions/capita 2006	1,5 est	0,5 ⁽²⁾	0,7 ⁽²⁾	0,5 ⁽²⁾

(1) 2006 (2) 2005 (3) 2004

Sources: Filme B/OMA-RECAM/Screen Digest/Screen International

Argentina

Cinema attendance in Argentina fell for the second successive year in 2006, falling back by an estimated 1.6%. Box office receipts grew, however, by an estimated 20%, reflecting an increase in average ticket prices from around USD 2.3 in 2005 to USD 3.1 in 2006. 74 local films (including co-productions) were released during the year, a 5 film increase on the total for 2005. The market share earned by these films shrank back slightly to 11.3% from 12.5% in 2005. The annual ranking was led by *Ice Age: The Meltdown*, with comedy *Bañeros III, todopodorosos* the highest ranked local film in 6th place. Argentinian-Spanish animation co-production, *El ratón Pérez*, figured at 8th place. US films captured 79.3% of box office takings, whilst European, Asian and other Latin American films registered a market share of 9.4%.

Brazil

Admissions to cinemas in Brazil totalled 90.3 million in 2006, a 3% drop on attendance in 2005 (93.6 million). This represents the second consecutive year of decline for Brazilian ticket sales. As in Argentina, rising ticket prices cushioned the fall and box office rose 3.2% to reach BRL 694.9 million. Average ticket price reached BRL 7.70 in 2006. 9.9 million cinema-goers saw Brazilian films, giving them a market share of 11%, very close to that registered in 2005. A total of 70 domestic productions were released during the year. Best performing among them was *Se eu fosse você*, which sold over

3.6 million tickets, bringing the comedy to third place in the annual ranking, the only domestic title to appear in the Top 20 for the year.

Early in 2007 a new fund for local films and changes to the existing audiovisual law to allow television companies to benefit from tax breaks for production were introduced. Adjustments were also made to the country's screen quota system, reducing requirements to exhibit Brazilian films for cinemas with one to four screens.

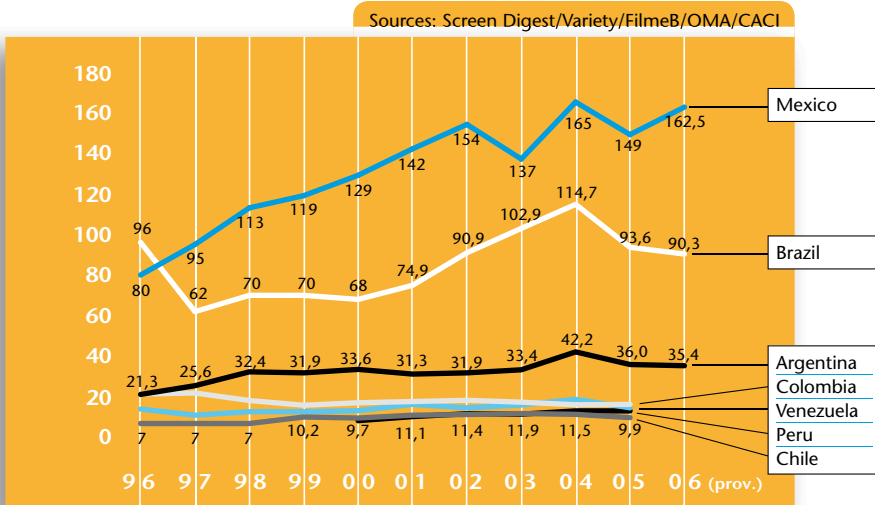
Mexico

Mexican box office returns shrank by 4.8% in 2005. First estimates for 2006 show that the trend has become positive once more. Growth in earnings was of around 9% though it is not yet certain to what extent this will be reflected in annual attendance. In 2005, in any case, the fall in box office returns was cushioned by higher average ticket prices, as overall admissions fell by 9.7%. Screen numbers have on the contrary been climbing, reaching a total of 3 682 in 2006. Many of the US studios have established production branches in Mexico, and films made by local independent companies can find it hard to compete with the well-packaged, precisely targeted and heavily marketed films made by these companies. Mexican creative talent was, however, in the spotlight in the early months of 2007, with films by three Mexican directors nominated in numerous Academy Award categories.

Sources: OMA-RECAM/FilmeB/
Variety/Screen International

Cinema attendance in Latin America | 1996-2006

In millions.



Top 20 films by admissions in Brazil | 2006

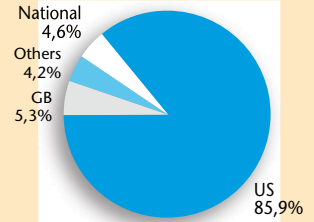
	Original title	Country of origin	Director	Distributor	Admissions
1	Ice Age: The Meltdown	US	Carlos Saldanha	Fox	5 866 186
2	The Da Vinci Code	US/GB inc	Ron Howard	Sony	4 663 464
3	Se eu fosse você	BR	Daniel Filho	Fox	3 644 956
4	X-Men: The Last Stand	US	Brett Ratner	Fox	3 276 585
5	Pirates of the Caribbean: Dead...	US	Gore Verbinski	Buena Vista	3 115 020
6	Cars	US	John Lasseter	Buena Vista	2 833 924
7	The Chronicles of Narnia	US/NZ inc	Andrew Adamson	Buena Vista	2 726 150
8	Superman Returns	US/AU inc	Bryan Singer	Warner	2 561 062
9	Over the Hedge	US	Johnson & Kirkpatrick	UIP	2 276 843
10	Click	US/GB inc/DE	Frank Coraci	Sony	2 271 721
11	Mission: Impossible III	US/DE	J.J. Abrams	UIP	1 946 085
12	King Kong	US/NZ inc	Peter Jackson	UIP	1 861 740
13	Hoodwinked!	US	C. & T. Edwards	Eur/Mam	1 470 877
14	The Devils Wears Prada	US	David Frankel	Fox	1 427 996
15	Garfield 2: A Tale of Two Kitties	US/GB inc	Tim Hill	Fox	1 327 756
16	Saw III	US	Darren Lynn Bousman	Buena Vista	1 323 420
17	Happy Feet	AU/US	George Miller	Warner	1 151 743
18	Fun with Dick and Jane	US	Dean Parisot	Sony	1 140 465
19	Open Season	US	R. Allers & J. Culton	Sony	1 112 919
20	Pink Panther	US	Shawn Levy	Fox	1 102 866

Source: FilmeB

Australia

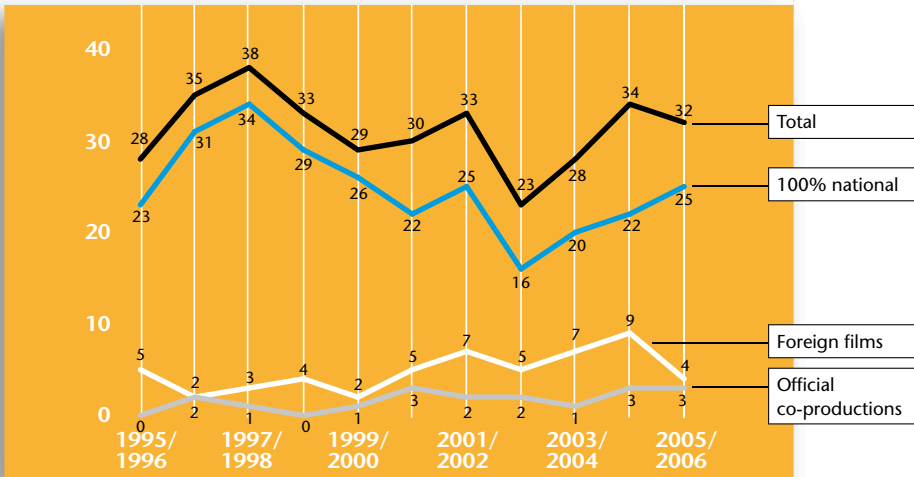
Population 2006	20,80 million
GDP 2005	711 billion USD
1 AUD	0,81 USD (March 2007)
Admissions 2006	83,6 million
Average admissions/capita 2006	4,0
Average ticket price 2006	10,37 AUD (= 7,8 USD)
Screens 2006	1 964

Market shares 2006



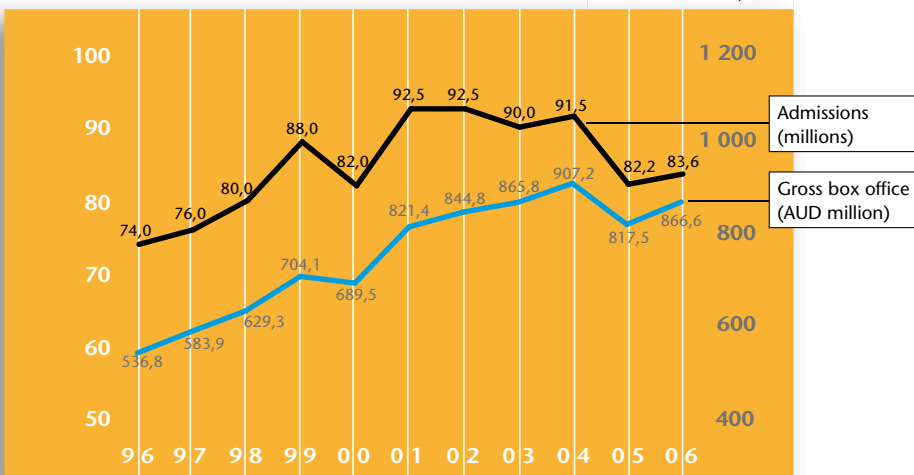
Number of feature films produced in Australia | 1995-2006

Source: AFC



Admissions and gross box office | 1996-2006

Sources: MPDAA/AFC



Top 20 films by gross box office in Australia | 2006

	Original title	Country of origin	Distributor	Gross box office (AUD)
1	Pirates of the Caribbean: Dead Man's Chest	US	BVI	38 051 837
2	The Da Vinci Code	US/GB inc	Sony	27 052 375
3	Ice Age: The Meltdown	US	Fox	24 566 473
4	Casino Royale	GB inc/US/DE/CZ	Sony	21 771 132
5	Chronicles of Narnia I	US/NZ inc	BVI	21 244 281
6	Cars	US	BVI	17 663 541
7	Borat	US	Fox	17 127 217
8	X-Men: The Last Stand	US	Fox	16 593 952
9	The Devil Wears Prada	US	Fox	16 556 903
10	Over the Hedge	US	UIP/Paramount	16 313 606
11	Walk the Line	US	Fox	15 200 446
12	Click	US/GB inc/DE	Sony	14 091 825
13	Superman Returns	US/AU inc	Warner	14 063 388
14	Chicken Little	US	BVI	13 506 497
15	The Departed	US	Warner	11 462 023
16	Happy Feet	AU/US	Roadshow	11 085 606
17	Mission: Impossible III	US/DE	UIP/Paramount	11 064 351
18	Memoirs of a Geisha	US	Roadshow	10 423 197
19	You, Me and Dupree	US	UIP/Paramount	10 237 980
20	The Break-Up	US	UIP/Paramount	9 870 158

Source: MPDAA

Production

A total of 25 local features were produced in 2005/06, three more than in 2004/05. International co-production remained stable at 3 films in both periods. The overall value of local production was AUD 98 million (up 48.5% in relation to the preceding period), plus a further AUD 22 million contributed by the international co-productions (down 51% in relation to 2004/05). Significant shrinkage was seen in the number of foreign productions shooting in Australia, down to 4 in 2005/06 from 9 in 2004/05. Total Australian expenditure of these films was just AUD 23 million, the lowest figure since the AFC began compiling data in 1994/95. This data does not, however, track a number of high-profile productions using Australian post-production and special effects facilities during the period (Chen Kaige's *The Promise*, Zhang Yimou's *Riding Alone for Thousands of Miles*, Oliver Stone's *World Trade Center*,...). Nonetheless the drop prompted discussion of possible changes to the current incentives offered to foreign productions in the context of a review of government support to the film industry. Launched in July 2006, the review's final report is currently in preparation.

Exhibition and distribution

Box office receipts recovered in 2006, rising to AUD 866.6 million, a 6% increase and the second highest score on record. Rising average ticket prices contributed to the positive result, as overall cinema attendance remained relatively flat at 83.6 million tickets sold, a 1.7% increase on 2005, but still well below the admissions totals registered between 2001 and 2004.

Twenty-two new Australian features and seven documentaries were released during the year, bringing market share for local films to 4.6%, a significantly better result than that recorded in 2005 (2.8%) or in the lowpoint year of 2004 (1.3%), and in line with the 10-year average of 4.5%. Most popular of the local productions was the computer animation title, *Happy Feet*, at 16th place in the annual ranking, followed by multiple award winning low-budget comedy *Kenny* at 29th position. US films earned 85.9% of box office takings whilst UK films were the most successful European imports, earning a total of 5.3% of the annual gross, well ahead of French films at 1.1%.

Sources: AFC/MPDAA/Screen Daily

	Hong Kong	Indonesia	Malaysia	Philippines	Singapore	Taiwan	Thailand
Population 2005 (millions)	7,04	222,78	25,4	83,1	4,3	22,9	64,2
GDP 2005 (USD billions)	178	281	131	98	117	346	177
GBO 2005 (USD million)	116,8 ⁽¹⁾	80,2	75,7 ⁽¹⁾	86,7	85,2 ⁽¹⁾	186,2	100,5 ⁽¹⁾
Admissions 2005 (millions)	16,8	43,3	25,9	63,7	14,8	22,1	32,5
Admissions/capita 2005	2,4	0,2	1,0	0,8	3,4	1,0	0,5

(1) provisional 2006 figures

Cinema screens in Asia | 1998-2006

	1998	1999	2000	2001	2002	2003	2004	2005	prov. 2006
Hong Kong	185	189	178	175	184	188	197	206	193
Indonesia	2 100	2 100	2 050	2 000	850	850	876	902	~
Malaysia	310	310	310	300	295	203	223	265	299
Philippines	950	950	950	940	900	870	825	810	600
Singapore	133	144	144	131	139	156	147	151	~
Taiwan	672	673	680	690	669	684	694	660	~
Thailand	360	375	390	395	465	495	530	558	~

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

Thailand

Box office receipts in Thailand passed the THB 3 billion (USD 87 million) barrier in 2006 for the third year in succession. Results from the main cities of Bangkok and Chiangmai show a 2.5% increase in earnings. After a slow start to the year, the second half brought a succession of both US and domestic successes, with one of the top earning local films opening in the last month of the year. Nonetheless only two films, both US, earned more than THB 100 million (USD 2.9 million) in 2006, whereas five films (including three domestic productions) had crossed that milestone in 2005. The most popular Thai film was the first 3D animation to be produced locally, *Khan Kluay*, at 3rd place in the annual ranking, with the surprise comedy hit, *Noodle Boxer* coming in at 5th position despite a December opening. Market share for local films was 36.2% in 2006.

Hong Kong

Officially a part of the Chinese market, Hong Kong retains many characteristics that distinguish it from its mainland parent. These included in 2006 flat box office growth, with takings rising marginally to HKD 907 million (+0.22%) from HK 905 million in 2005. Market share for local films also remained stable, at 31% for a total of 51 domestic productions released (31.4% for 55 productions released in 2005).

Malaysia

In 2005 Malaysia was one of the few markets around the world that did not experience a fall in box office revenues. The trend towards positive growth continued in 2006, with total takings reaching a new all-time high of MYR 265.2 million, a 9% increase on the MYR 243.6 million earned in 2005. This represents a slight slow-down on the double-digit growth in box office that had been recorded over the previous four years. A total of 314 films were released. Local films had a good year, with Malaysia's first superhero film, *Cicak-Man*, finding a place in the Top 10.

Philippines

The film industry in the Philippines has been in difficulties since the late 1990's. Falling admissions and eroding screen numbers bear witness to a difficult economic climate and to relatively high levels of taxation on entertainment. Local production too has suffered. The Filipino film industry produced around 200 films per year in the early 90's and just 56 in 2005. Estimates put the total for 2006 at around 30 titles, the most successful of which was *Sukob (The Wedding Curse)*, the only domestic film to find a place in the annual Top 10.

Sources: The International Herald Tribune/
Screen Digest/Screen International

Top 10 films by box office in Hong Kong | 2006

	International title	Country of origin	Distributor	Box office in million HKD
1	Pirates of the Caribbean: Dead...	US	Intercontinental	35,8
2	The Da Vinci Code	US/GB inc	Sony	34,8
3	The Chronicles of Narnia	US/NZ inc	Intercontinental	30,6
4	Mission: Impossible III	US/DE	UIP	30,4
5	Fearless	HK/CN	EDKO Film	30,2
6	Superman Returns	US/AU inc	Warner Bros	25,6
7	Rob-B-Hood	HK/CN	Emperor/JCE	23,5
8	X-Men: The Last Stand	US	Fox	20,7
9	Eight Below	US	Intercontinental	18,1
10	Casino Royale ⁽¹⁾	GB inc/US/DE/CZ	Sony	16,5

(1) Still on release in early 2007.

Source: Screen International

Top 10 domestic films by box office in Hong Kong | 2006

	International title	Country of origin	Distributor	Box office in million HKD
1	Fearless	HK/CN	EDKO Film	30,2
2	Rob-B-Hood	HK	Emperor/JCE	23,5
3	Curse of the Golden Flower ⁽¹⁾	CN/HK	EDKO Film	15,7
4	A Battle of Wits ⁽¹⁾	CN/JP/KR/HK	EDKO Film	15,6
5	Confession of Pain ⁽¹⁾	HK	Media Asia	14,7
6	Re-Cycle	HK	Universe	14,2
7	Election 2	HK	One Hundred	13,6
8	Dragon Tiger Gate	HK	Mandarin	12,1
9	McDull, The Alumni	HK	Sil	10,7
10	2 Become 1	HK	Media Asia	10,2

(1) Still on release in early 2007.

Source: Screen International

Top 10 films by box office in Malaysia | 2006

	International title	Country of origin	Distributor	Box office in million USD
1	Pirates of the Caribbean: Dead...	US	Buena Vista Int.	2,94
2	Fearless	HK/CN	Buena Vista Int.	2,54
3	Casino Royale	GB inc/US/DE/CZ	Buena Vista Int.	2,46
4	X-Men: The Last Stand	US	20th Century Fox	2,06
5	Superman Returns	US/AU inc	Warner Bros	2,06
6	Mission: Impossible III	US/DE	UIP	2,03
7	Rob-B-Hood	HK	GSC	1,88
8	The Fast and the Furious: Tokyo Drift	US	UIP	1,6
9	Cicak Man	MY	Kru Films	1,43
10	Eragon	US	20th Century Fox	1,34

Source: Screen International

Top 10 films by box office in Thailand | 2006

	International title	Country of origin	Distributor	Box office in million USD
1	Pirates of the Caribbean: Dead...	US	Buena Vista Int.	3,58
2	Mission: Impossible III	US/DE	UIP	3,11
3	Khan Kluey	TH	Sahamongkol	2,82
4	Nong & Teng: Sons of Golden Mountain	TH	Sahamongkol	2,77
5	Noodle Boxer ⁽¹⁾	TH	RS Films	2,76
6	X-Men: The Last Stand	US	20th Century Fox	2,66
7	Superman Returns	US/AU inc	Warner Bros	2,42
8	Casino Royale	GB inc/US/DE/CZ	Buena Vista Int.	2,34
9	The Da Vinci Code	US/GB inc	Buena Vista Int.	2,14
10	Seasons Change	TH	GTH	2,08

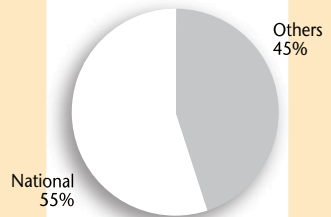
(1) Still on release in early 2007.

Source: Screen International

People's Republic of China

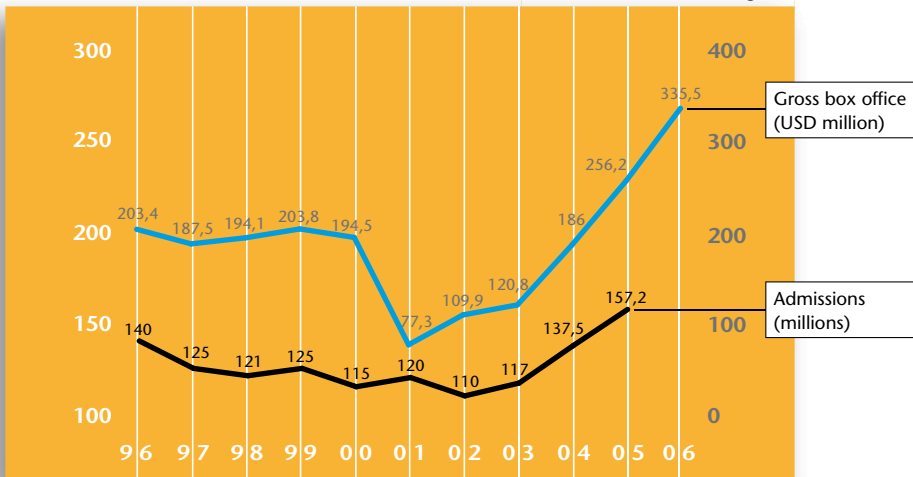
Population 2006	1 314 million
GDP 2006	2 512 billion USD
1 USD	7,74 CNY (April 2007)
Admissions 2005 est	157 million
Average admissions/capita 2005	0,14
Average ticket price 2005	12,7 CNY (= 1,55 USD)
Total screens 2005	39 425
Total modern screens 2006	3 034

Market shares 2006 est



Admissions and gross box office | 1996-2006

Sources: SARFT/Screen Digest



Production and exhibition

A total of 330 films were produced during 2006, an 26% increase on 2005 when 260 titles were completed. Of the 270 companies producing films in 2006, 75% were private. Approximately 100 titles were shot and post-produced in a digital format, significantly more than the 52 digital films finished in 2005. Nonetheless, only 30% of the 2006 films managed to secure a theatrical release during the year, a slightly drop on the ratio observed in 2005, when 34% of the total production count was released in cinemas. With box office receipts highly concentrated around the Top 10 domestic titles, mid-range budget films, of which there were around 200, struggled to recoup costs or even to find release. The increase in the numbers of screens is one of the principal motors for Chinese box office growth. A total of 82 new cinemas were opened in 2006, contributing an additional 366 screens and bringing the modern screen base to around 3 000 screens in 1 300 sites run by 34 cinema circuits.

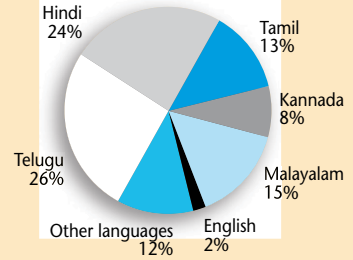
Distribution

Chinese box office receipts continued to grow rapidly in 2006, reaching an estimated CNY 2.62 billion (USD 335.5 million), a 31% increase on the CNY 2 billion (USD 256.2 million) registered in 2005. Five of the Top 10 films were local productions and overall market share for Chinese films was estimated by official sources at 55.03%, just under the 55.1% registered in 2005. The highest earning film was Zhang Yimou's historic epic *Curse of the Golden Flower*, which earned CNY 250 million, ahead of Feng Xiaogang's adaptation of Hamlet, *The Banquet*, with CNY 130 million. Highest ranking imported title was *The Da Vinci Code* with CNY 105 million, with *King Kong* (CNY 102 million), *Mission: Impossible III* (CNY 82 million), *Poseidon* (CNY 69 million) and *Superman Returns* (CNY 62.5 million) also figuring in the Top 10.

Sources: SARFT/Screen Digest/Variety

Population 2005	1 103 million
GDP 2005	801 billion USD
1 USD	43,2 INR (April 2007)
Admissions 2005 est	3 770 million
Average admissions/capita 2005	3,4
Average ticket price 2005	13,89 INR (= 0,32 USD)
Screens 2005 est	10 500

Indian feature films certified by language 2005



Top 10 films by box office in India | 2006

Title	Director	Producer	Date of release	Box office INR crore ⁽¹⁾
1 Dhoom 2	Sanjay Gadhavi	Yash Raj Films	24/11/06	87,52
2 Krrish	Rakesh Roshan	Rakesh Roshan	23/06/06	85,36
3 Lage Raho Munnabhai	Raju Hirani	Aditya Chopra	01/09/06	68,41
4 Fanaa	Kunal Kohli	Yash Raj Films	26/05/06	61,13
5 Rang de Basanti	Rakesh Mehra	Rakesh Mehra	27/01/06	54,60
6 Don: The Chase Begins Again	Farhan Akhtar	Ritesh Sidhwani	20/10/06	46,43
7 Kabhi Alvida Naa Kehna	Karan Johar	Hiroo Johar	11/08/06	44,49
8 Phir Hera Pheri	Neeraj Vora	Firoz Nadiadwala	09/06/06	43,22
9 Bhagam Bhag	Priyadarshan	Shree Ashtavinayak	22/12/06	41,27
10 Vivah	Sooray Barjatya	Barjatya Rajshri	10/11/06	39,83

(1) 1 crore = 10 million INR, adjusted all-India net.

Source: IBOS Network

Production

In terms of the number of films, the Indian industry continues to figure amongst the world's most prolific producers, with a total of 1 041 domestic features certified for exhibition by the Central Board of Film Certification in 2005. 245 films out of this total were Hindi-language works, with a further 552 films certified in four Southern Indian languages: Telugu (268 films), Tamil (136 films), Kannada (81 films) and Malayalam (67 films). Tamil films in particular had a good year at the box office in 2006, boosted by the State Government's decision in July to exempt films with Tamil titles from the 15% local entertainment tax.

The Hindi-language, or Bollywood, box office was topped by action sequel *Dhoom 2*, which earned the equivalent of USD 37 million for a production budget of USD 0.6 million, followed by the adventures of superhero *Krrish*, which took USD 31 million for a budget of USD 0.5 million. The highest ranked non-Indian title would appear to have been *Casino Royale*, at USD 0.9 million, with *Superman Returns*, *Pirates of the Caribbean: Dead Man's Chest* and *The Da Vinci Code* among the more successful imports.

Exhibition

Figures presented at the annual Federation of Indian Chambers of Commerce FRAMES conference in March 2007 put Indian theatrical box office at INR 64 billion (USD 1.5 billion) in 2006 and predicted strong growth in the industry over the next five years. The construction of multiplexes, the move to digital screens (generally with lower end equipment) and increasingly sophisticated corporate financing structures are considered as factors contributing to market buoyancy.

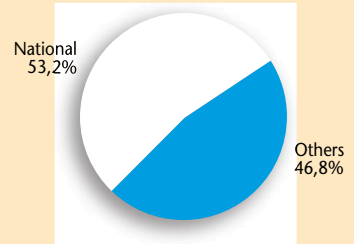
Total 2005 cinema admissions in India were estimated at 3.8 billion tickets sold, maintaining the sub-continent in first place worldwide in terms of attendance in a single market. Ticket prices remain low, however, at an average of around INR 13.9 (USD 0.32), but can climb significantly higher for tickets sold in urban complexes. The five major exhibitors owned a total of 193 multiplex screens in 2006 and this number is expected to grow significantly over the next five years.

Sources: IBOS Network/Screen Digest/
Screen International/The Hindu/The Film
& TV Producers Guild of India

Japan

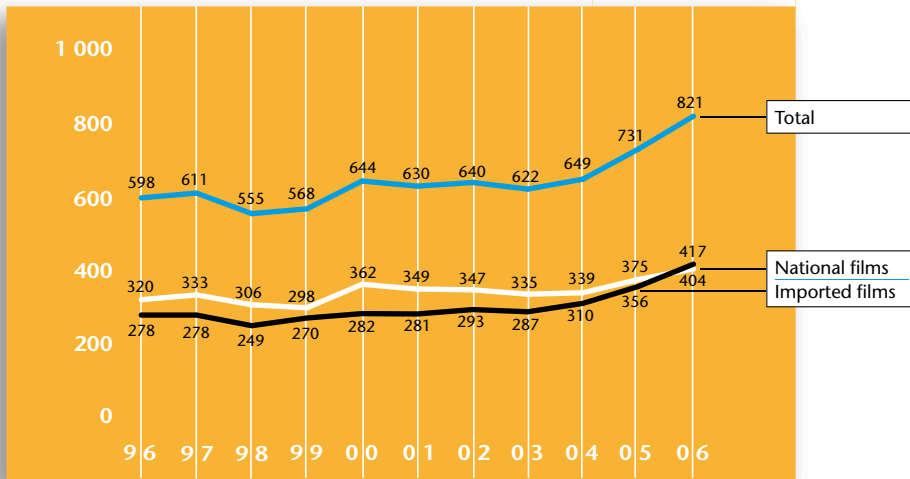
Inhabitants 2006	127,7 million
GDP 2005	4 559 billion USD
1 USD	116,7 JPY (March 2007)
Admissions 2006	164,3 million
Average admissions/capita 2006	1,29
Average ticket price 2006	1 233 (= 10,6 USD)
Screens 2006	3 062
Screens in complexes 2006	2 230

Market shares 2006



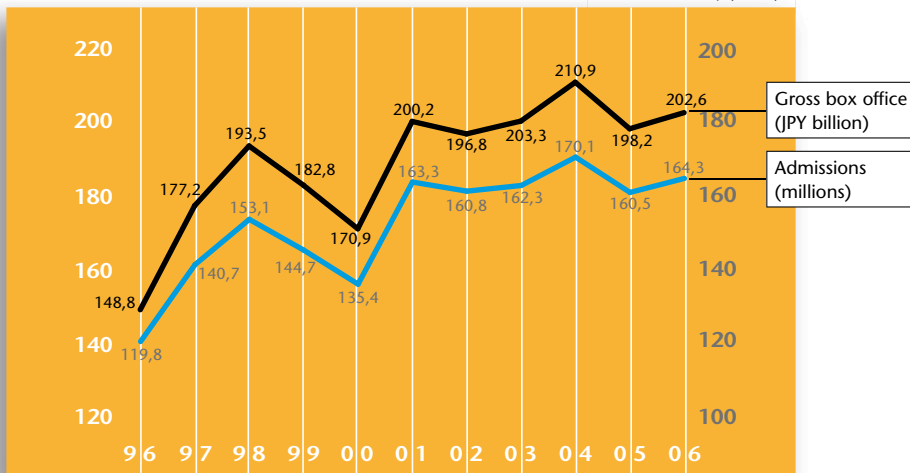
Number of films released in Japan | 1996-2006

Source: MPPAJ (Eiren)



Admissions and gross box office | 1996-2006

Source: MPPAJ (Eiren)



Top 20 films by gross box office in Japan | 2006

JPY billion.

	Title (Alternative title)	Country of origin	Distributor	Gross box office est
1	Pirates of the Caribbean: Curse Black Pearl	US	Buena Vista	10,02
2	The Da Vinci Code	US/GB inc	Sony Pictures	9,05
3	Gedo senki (Tales from Earthsea)	JP	Toho	7,65
4	Umizaru 2: Test of Trust	JP	Toho	7,10
5	The Chronicles of Narnia I	US/NZ inc	Buena Vista	6,86
6	The Uchoten Hotel (Suite Dreams)	JP	Toho	6,08
7	Nihon chinbotsu (The Sinking of Japan)	JP	Toho	5,34
8	Desu nôto: The Last Name (Death Note: The Last Name)	JP	Warner Bros	5,20
9	Mission: Impossible III	US/DE	UIP	5,15
10	Pokémon Ranger to umi no ouji (Pokémon Ranger...)	JP	Toho	3,40
11	Doraemon: Nobita's Dinosaur	JP	Toho	3,28
12	Flightplan	US	Buena Vista	3,12
13	Nada sô sô (Tears for You)	JP	Toho	3,10
14	Meitantei Conan: Tantei-tachi no... (Detective Conan...)	JP	Toho	3,03
15	Desu nôto (Death Note)	JP	Warner Bros.	2,85
16	World Trade Center	US	UIP	2,40
17	Cars	US	Buena Vista	2,23
18	Ashita no kioku (Memories of Tomorrow)	JP	Toei	2,20
19	Trick: The Movie 2	JP	Toho	2,10
20	Kencho no hoshi (Star Reformer)	JP	Toho	2,08

2006 releases only.

Source: MPPAJ (Eiren)

Production and distribution

A record-breaking 821 films were released in the Japanese market in 2006, surpassing by 44 titles the previous record established in 1989. Principal contributor to the record was the unprecedented number of new Japanese titles on offer (417), up by 61 titles from 2005 and signalling a return to the values last seen in the early 1970's. Market share for domestic films also reached new heights, registering 53.2% of box office returns, the best result since 1981. Foreign films saw their market share shrink by 18.5% in relation to 2005.

Animation title *Gedo Senki (Tales from Earthsea)* at third position in the annual ranking, was the highest placed Japanese film. Based on a series of novels by Ursula Le Guin, the Studio Ghibli film was the first to be directed by the son of Hayao Miyazaki. Twelve further local titles figured in the 2006 Top 20, including the annual outings in the animation series *Pokémon*, *Doraemon* and *Meitantei Conan* and two films based on the popular manga series *Death Note*. No South Korean film figured among the most successful titles in 2006, in contrast to 2005 when two such titles appeared.

Ten of the Japanese films in the Top 20 were distributed by Toho-Towa, a subsidiary of one of Japan's oldest and largest entertainment companies. From summer 2007 Toho-Towa will take over the distribution of Universal Pictures titles in Japan from UIP, while UIP will continue to handle titles from Paramount. 2006 also marked the increased involvement of broadcasters in feature production, with all of the top 10 Japanese titles produced or co-produced by television networks.

Exhibition

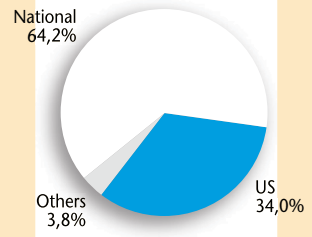
Total admissions to cinemas in Japan grew by 2.4% to 164.3 million, while box office receipts rose by 2.2% to JPY 202.5 billion, from JPY 198.2 billion in 2005. Average ticket prices (before tax) slipped back slightly for the third consecutive year, from 1 235 yen in 2005 to 1 233 yen in 2006. Screen numbers showed yet further expansion, passing from 2 926 in 2005 to 3 062 in 2006 (+136 screens) with 73% of these situated in cinema complexes.

Sources: EIREN/Screen Digest/Variety

South Korea

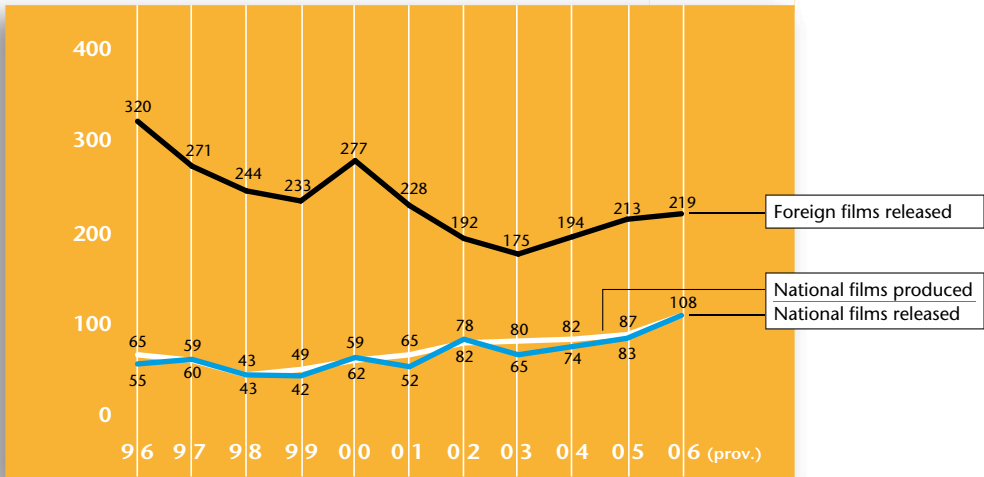
Population 2006	48,456 million
GDP 2005	788 billion USD
1 USD	949,3 KRW (April 2007)
Admissions 2006 est	164 million
Average admissions/capita 2006 est	3,38
Average ticket price 2005	6 172 KRW (= 6,03 USD)
Screens 2005	1 648

Market shares 2006 (Seoul)



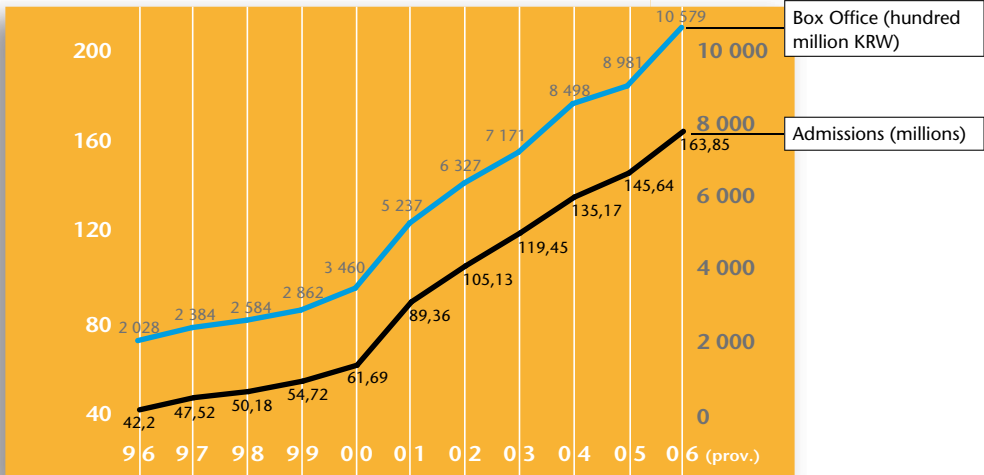
Number of feature films produced and released | 1996-2006

Source: KOFIC



Admissions and gross box office | 1996-2006

Source: KOFIC



Top 10 Korean films by admissions in South Korea | 2006

	International title	First release	Distributor	Director	Admissions
1	The Host	27/07/06	Showbox/Mediaplex	Joon-ho Bong	13 019 740
2	King and the Clown	29/12/05	Cinema Service	Jun-ik Lee	12 302 831
3	Tazza: High Rollers	28/09/06	CJ Entertainment	Dong-hun Choi	6 847 777
4	My Boss, My Teacher	19/01/06	CJ Entertainment	Dong-won Kim	6 105 431
5	Hanbando	13/07/06	CJ Entertainment	Woo-suk Kang	3 880 308
6	200 Pounds Beauty ⁽¹⁾	14/12/06	Showbox / Mediaplex	Yong-hwa Kim	3 561 866
7	Marrying the Mafia 3	21/09/06	Showbox / Mediaplex	Yong-ki Jeong	3 464 516
8	Maundy Thursday	14/09/06	Prime Entertainment	Hae-sung Song	3 132 320
9	Forbidden Quest	23/02/06	CJ Entertainment	Dae-woo Kim	2 576 022
10	My Scary Girl	6/04/06	CJ Entertainment	Jae-gon Son	2 286 745

Source: KOFIC

Top 10 foreign films by admissions in South Korea | 2006

	International title	First release	Distributor	Director	Admissions
1	Mission: Impossible III	3/05/06	UIP Korea	J.J. Abrams	5 740 789
2	Pirates of the Caribbean...	6/07/06	Buena Vista	Gore Verbinski	4 628 903
3	The Da Vinci Code	18/05/06	Sony Pictures	Ron Howard	3 339 082
4	Night at the Museum	21/12/06	20th Century Fox	Shawn Levy	2 545 637
5	The Chronicles of Narnia	29/12/05	Buena Vista	Andrew Adamson	2 505 133
6	Poseidon	31/05/06	Warner Bros	Wolfgang Petersen	2 214 600
7	X-Men: The Last Stand	15/06/06	20th Century Fox	Brett Ratner	2 096 180
8	The Devil Wears Prada	26/10/06	20th Century Fox	David Frankel	1 730 719
9	Superman Returns	28/06/06	20th Century Fox	Bryan Singer	1 764 758
10	The Holiday ⁽¹⁾	14/12/06	UIP Korea	Nancy Meyers	1 136 000

(1) Still on release in early 2007.

Source: KOFIC

Distribution and exhibition

South Korean admissions rose for the tenth consecutive year in 2006, reaching a provisional total of 163.9 million tickets sold, an increase of 12.5% on the 2005 total (145.6 million) though principal exhibitor CJ CGV announced a yet higher total of 166 million tickets (+14.6%). An unprecedented number of domestic films (108) were on offer, contributing to an exceptional national market share, provisionally announced at 64%. Two films set records, *The King and the Clown*, released at the end of 2005, attracted more than 12 million cinema-goers, only to be overtaken later in 2006 by creature thriller *The Host*, which set a new record for admissions to a single film. Seven domestic titles figured in the overall Top 10 for the year and a total of 20 Korean films sold more than 2 million tickets.

Despite the undoubted success of local titles, concerns were expressed by industry analysts over the fact that higher production budgets and, above all, swelling promotional costs meant that many of the films released failed to cover their costs. Lower production levels are predicted for 2007, and the monopolisation of screens by a

small number of films was a matter for discussion at the Korean national assembly.

For the first time in April 2007 a collective agreement was signed between the recently founded Federation of Korean Film Workers' Union and the Korean Producers' Association. Its dispositions, while probably increasing production costs, should also have a rationalising effect on industry practice. The agreement will take effect in July 2007, at the same time as a new 3% ticket tax destined to further fund the Korean Film Council goes into operation.

Korean films abroad

Exports of Korean film and television material fell back sharply during the year, in part due to the cooling off of the cultural phenomenon known as 'Hallyu'. Disappointing performances by a number of Korean titles acquired at high prices for the Japanese market compounded the effect with first half export figures for this market dropping to USD 8.72 million, compared to USD 31 for the same period in 2005.

Sources: KOFIC/Cinemasie

Africa - Middle East

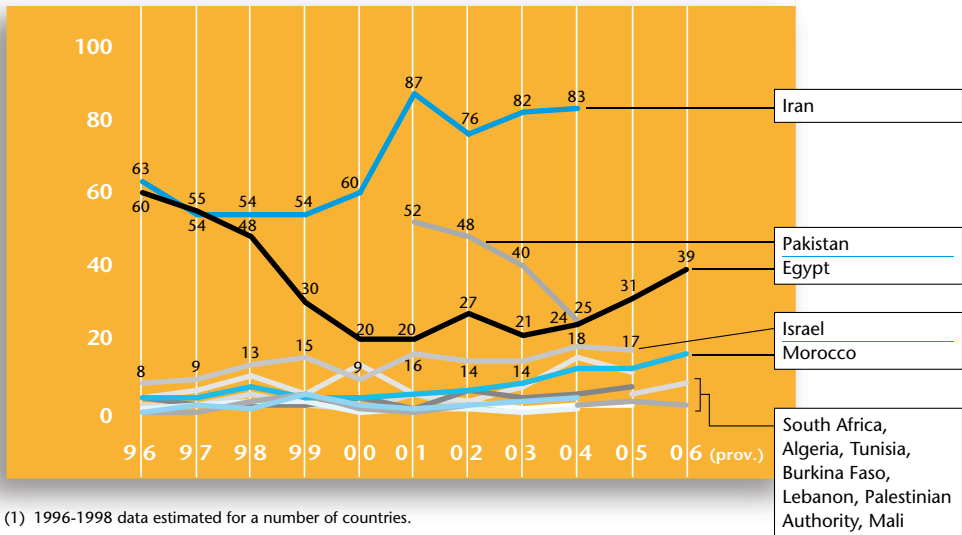
	Bahrain	Burkina Faso	Benin	Egypt	Israel	Iran	Lebanon
Population 2005 (millions)	0,73	13,2	8,4	74	6,7	69,5	3,6
GDP 2005 (USD billions)	12 ⁽³⁾	6	4	94	130	157 ⁽¹⁾	~
Screens 2005	26	19 ⁽¹⁾	7 ⁽²⁾	222	380	244	87 ⁽³⁾
Admissions 2005 (millions)	1,25 ⁽¹⁾	1,5 ⁽⁴⁾	0,06 ⁽⁴⁾	24,9	9,6	8,0 ⁽²⁾	2,1 ⁽³⁾
Admissions/capita 2005	1,7	0,1 ⁽⁴⁾	0,01 ⁽⁴⁾	0,3	1,4	0,1 ⁽²⁾	0,6

	Morocco	Mali	Senegal	Tunisia	South Africa	United Arab Emirates
Population 2005 (millions)	31,0	13,5	11,7	10,1	47,4	4,5
GDP 2005 (USD billions)	43,7 ⁽³⁾	5	8	29	240	100 ⁽¹⁾
Screens 2005	143	11 ⁽⁴⁾	22 ⁽²⁾	22	799	185
Admissions 2005 (millions)	6,0	~	0,8 ⁽⁴⁾	0,3	27,6	6,4 ⁽³⁾
Admissions/capita 2005	0,2	~	0,1 ⁽⁴⁾	0,03	0,6	1,4

(1) 2004 (2) 2002 (3) 2006 (4) 2001

Number of feature films produced in Africa and the Middle East ⁽¹⁾ | 1996-2006

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



(1) 1996-1998 data estimated for a number of countries.

Top 10 films by box office in Iran | 2006

Title	Country of origin	Director	Box office in USD M est
1 Atash Bas (Cease-Fire)	IR	Tahmineh Milani	1,07
2 M for Mother	IR	Rassul Mollaqlolipur	0,54
3 Sham-e Arousi (Wedding Supper)	IR	Ebrahim Vahidzadeh	0,54
4 Under the Peach Tree	IR	Iraj Tahmasb	0,40
5 Chaharshanbeh-Soori (Fireworks Wednesday)	IR	Asghar Farhadi	0,40
6 Ezdevaj Beh Sabk-E Irani (Marriage, Iranian Style)	IR	Hassan Fat'hi	0,40
7 Setarah Café	IR	Saman Moghaddam	0,40
8 Be Nam-e Pedar (In the Name of the Father)	IR	Ebrahim Hatami-Kia	0,40
9 Trap ⁽¹⁾	IR	Sirus Alvand	0,40
10 Yek Tekke Nan (A Piece of Bread) ⁽¹⁾	IR	Kamal Tabrizi	0,11

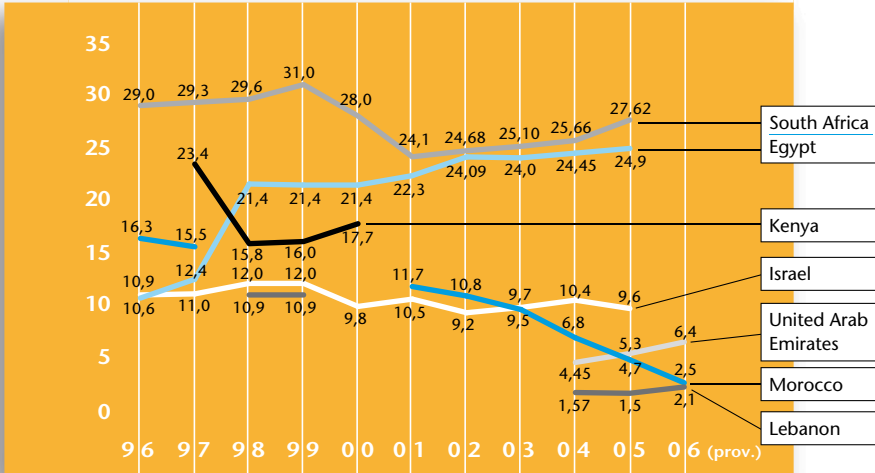
(1) 2005.

Source: Mehr News Agency

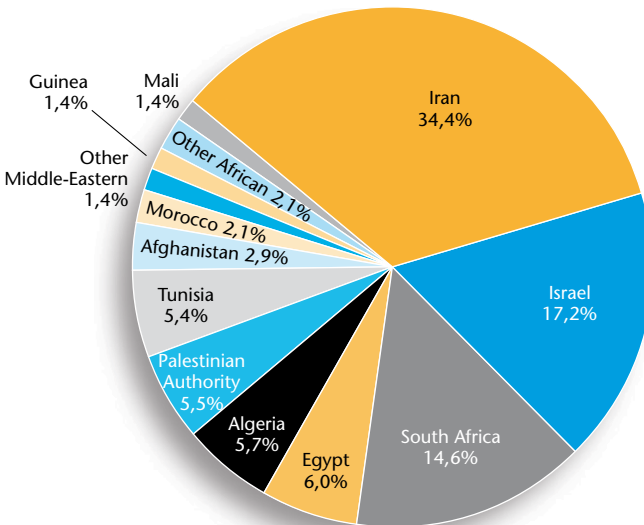
Admissions in Africa and the Middle East | 1996-2006

In millions.

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



Breakdown by origin of admissions to African and Middle Eastern films in Europe | 1996-2006



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

FOCUS 2007 was prepared by the European Audiovisual Observatory. We would like to thank the following sources:

ANICA	IT	http://www.anica.it
Audiovisual Information Centre	SK	http://www.aic.sk/
Australian Film Commission	AU	http://www.afc.gov.au/
CAA	GB/IE	http://www.carltonscreen.com/htm/research.php
Canadian Audio-visual Certification Office	CA	http://www.pch.gc.ca/progs/ac-ca/progs/bcpac-cavco/index_e.cfm
Central Board of Film Certification	IN	http://www.cbcindia.tn.nic.in
Centrul National al Cinematografie	RO	http://www.cncinema.abt.ro/index.aspx
Centre national de l'audiovisuel	LU	http://www.cna.public.lu/
CFTPA	CA	http://www.cftpa.ca/
Cinemasio		http://www.cinemasio.com
Cinetel	IT	http://www.cinetel.it
CNC	FR	http://www.cnc.fr
Czech Film Center	CZ	http://www.filmcenter.cz
Danish Film Institute	DK	http://www.dfi.dk/
EIREN	JP	http://www.eiren.org
Estonian Film Foundation	EE	http://www.efsa.ee/
Fachverband der Audiovisions- und Filmindustrie	AT	http://www.fafu.at/
Farabi Cinema Foundation	IR	http://www.irna.ir/occasion/20th-bahar/farabi/Films.htm
FFA	DE	http://www.ffa.de
FilmeB	BR	http://www.filmeb.com.br
<i>Film & Kino</i>	NO	http://www.filmweb.no/filmogkino/
Filmski Sklad Republike Slovenije	SI	http://www.film-sklad.si/slo/
Finnish Film Foundation	FI	http://www.ses.fi/
<i>Le film français</i>	FR	http://www.lefilmfrancais.com/
Greek Film Center	GR	http://www.gfc.gr/
Hagstofa Islands	IS	http://www.static.is
IBOS Network	IN	http://ibosnetwork.com/default.asp
ICAA	ES	http://www.mcu.es/jsp/plantilla_wai.jsp?id=1&area=cine
ICAM	PT	http://www.icam.pt/
Institut français de Taipei	TW	http://www.fi-taipei.org/
Korean Film Council	KR	http://www.koreanfilm.or.kr/
Lietuvos Kinas	LT	http://www.theatre.lt/liet_kinas.php
Malta Film Commission	MT	http://www.mfc.com.mt/home.asp?mainid=6
Media Live	IE	http://www.medialive.ie/
MEDIA Salles	IT	http://www.mediasalles.it
Mehr News Agency	IR	http://www.mehrnews.com
Ministry of Culture	CZ	http://www.mkcr.cz
Ministry of Culture	PL	http://www.mk.gov.pl/
<i>Moniteur du film en Belgique</i>	BE	
MPAA	US	http://www.mpa.org
National Film Office	HU	http://www.nemzetifilmiroda.hu
National Film Center	BG	http://www.nfc.bg/
National Film Centre	LV	http://www.nfc.lv
Nederlands Fonds voor de Film	NL	http://www.filmfund.nl/
NFC (NVB - NVF)	NL	http://www.nfcstatistiek.nl/
Norsk Filmfond (NFF)	NO	http://www.filmfondet.no/
Observatoire de la culture du Québec	CA	http://www.stat.gouv.qc.ca/observatoire/default.htm
Observatorio del Mercosur Audiovisual (OMA)	AR	http://www.oma.recam.org/
Office fédéral de la statistique	CH	http://www.admin.ch/bfs
Osservatorio italiano dell'audiovisivo	IT	http://www.cinecitta.com/holding/iniziativa/iniziativa.asp?id=142
Polish Film Institute	PL	http://www.pisf.pl
Procinéma	CH	http://www.procinema.ch/
<i>Russian FilmBusiness</i>	RU	http://www.kinobusiness.com/
SARFT	CN	http://www.sarft.gov.cn
<i>Screen Digest</i>	GB	http://www.screendigest.com/
<i>Screen Finance</i>	GB	http://www.informamedia.com
<i>Screen International</i>	GB	http://www.screendaily.com/
<i>Sinema Gazetesi</i>	TR	
Singapore Media Development Authority	SG	http://www.mda.gov.sg/wms.www/index_flash.aspx
Slovenian Film Fund	SI	http://www.film-sklad.si/eng/
SPIO	DE	http://www.spio.de/
Statistique Canada / Statistics Canada	CA	http://www.statcan.ca/
Swedish Film Institute	SE	http://www.sfi.se/
Unie Filmovych Distributoru	CZ	http://www.ufd.cz/
UK Film Council	GB	http://www.ukfilmcouncil.org.uk/
<i>Variety</i>	US	http://www.variety.com



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