MARCHÉ DU FILM 2009

FOCUS

World Film Market Trends   Tendances du marché mondial du film

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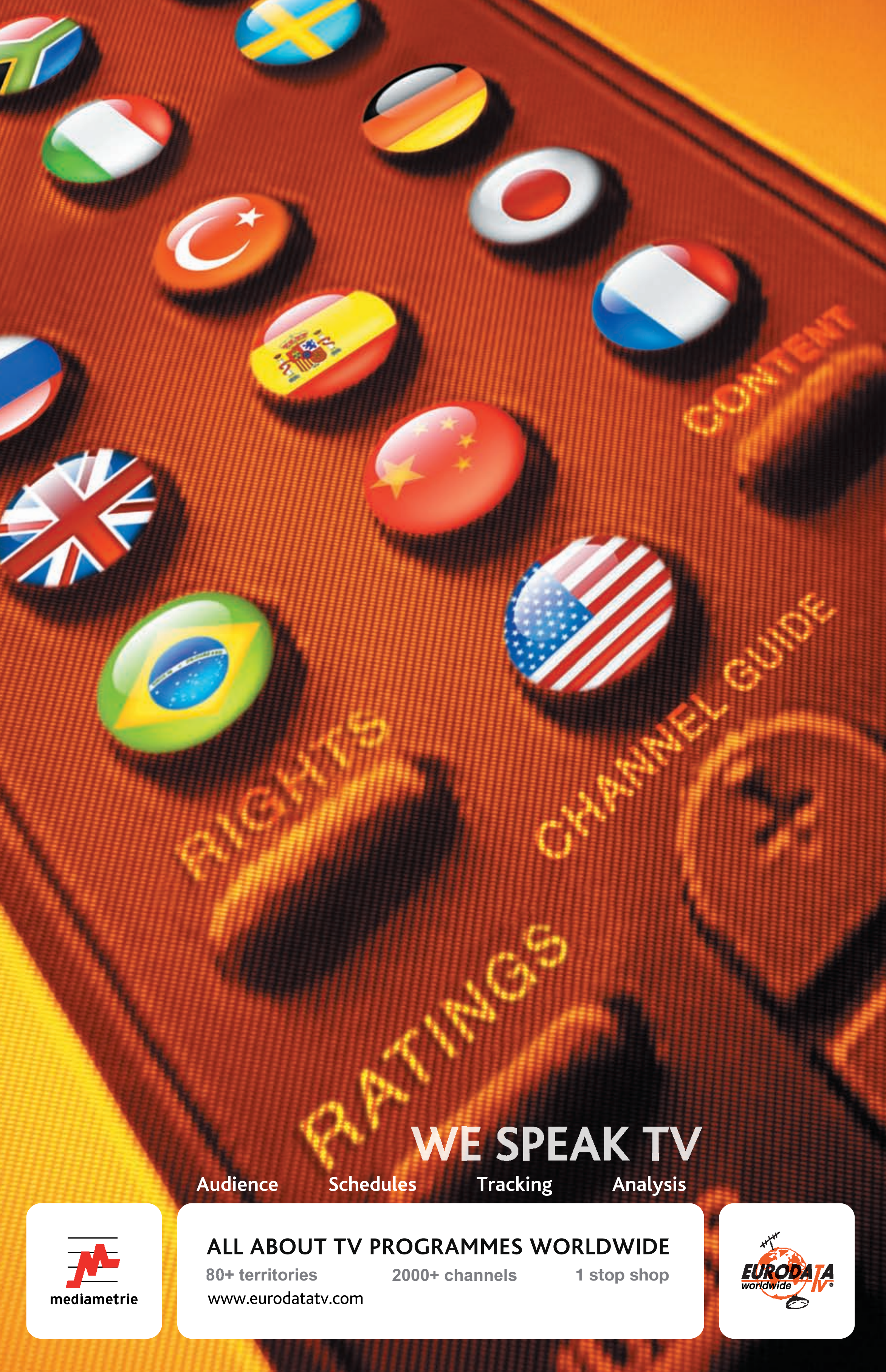
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MARCHÉ DU FILM
FESTIVAL DE CANNES

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Editorial

With its key indicators, *FOCUS 2009* gives you a complete overview of the worldwide film industry, and highlights new up-and-coming areas such as Latin America or the Middle East.

It is an indispensable guide to understanding the undercurrents and changes of the international market, in a context where it is becoming vital to anticipate changes as they happen, so as to be able to adjust strategies.

Jérôme Paillard
Executive Director

Le *FOCUS 2009* vous offre, avec ses indicateurs clés, une vue d'ensemble de l'industrie du cinéma mondiale, et met en valeur de nouveaux territoires en pleine expansion, comme l'Amérique Latine ou le Moyen-Orient.

Un guide indispensable pour comprendre les courants et les évolutions du marché international, dans un contexte où il devient indispensable d'anticiper les mutations en cours pour ajuster ses stratégies.

Jérôme Paillard
Directeur Délégué

FOCUS 2009 World Film Market Trends, appears for the twelfth 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

FOCUS 2009, Tendances du marché mondial du film, paraît pour la douzième année consécutive. Nous nous réjouissons de cette 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

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)*

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)*

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SLOW AND CAUTIOUS 1

In a time of economic crisis, particularly for the automobile industry, the film industry observer can only be amused by the fact that* Fast and Furious 4*, a film about high-powered cars, is quoted as a leading contributor to the upturn in cinema admissions.

According to figures supplied by the National Association of Theatre Owners (NATO), cinema attendances in the United States increased by 5.6% and box office receipts by 8.8% in the first quarter of 2009. As that organisation likes to point out, attendances rose in five of the last seven recessions experienced by the American economy. More than any other form of entertainment, and perhaps because the prices of cinema tickets have risen less rapidly than others, going to the cinema is said to be the best consolation for households in a period of crisis. The American film exhibitors are all the more optimistic as they believe that digital cinema and films in 3D are likely to attract new audiences. Though in dollar terms American and international box office receipts may have broken records in 2008, attendances in the United States actually fell by 2.6%, reaching their lowest level since 1997, whereas they remained stable in Europe. The growth of international box office receipts can be explained more by the weakness of the dollar than by a trend towards strong growth in admissions (which can be seen only in China and Russia).

We should therefore be wary of jumping to conclusions. The volatility of cinema attendances is such that underlying trends cannot be assessed over a period of just a few months. The good performance of the American cinema market in the last few months can be explained by strictly domestic reasons within the film industry, especially the fact that the distributors seem to have discovered the benefits of spreading release dates better throughout the year and that January and February are not necessarily slack months after the end-of-year peak. We do not yet have much European data for the first quarter of 2009 but it is interesting to note that, for example, the Kinepolis circuit, which has a presence in five countries, recorded a fall in cinema attendances of 17%. In France, the first-quarter drop was 15.2%. These two figures, which are of the same magnitude, are clearly skewed by the exceptional character of the first quarter of 2008, which was marked by the success of *Bienvenue chez les Ch'tis (Welcome to the Sticks)*. By contrast, in the United Kingdom, the first two months were better than in 2008, with attendances rising by 7.7% in January and 16.4% in February, thanks in particular to the success of *Slumdog Millionaire*.

In an industry like the cinema, the effects of the crisis are likely to be slow in making themselves felt. This is because, while attendances are rising, production has been hit head-on by the crisis. According to a Reuters article widely carried by the press, the hedge funds to which Hollywood has been turning since 2005 have virtually disappeared, while the amount they provided to help finance "slates" between 2005 and 2008 is estimated at 15 billion US dollars. Some investors that had banked on quick returns are said to have tried to sell off their positions in slate deals at discounts of 30 to 70% to specialised investors that are able to bear the risks over the long term. Most banks have also reduced their positions in film production and raised their interest rates. It is estimated that in 2009 the majors are likely to further reduce the number of releases, which already fell from 205 in 2006 to 162 in 2008. Wide releases for 2009 are estimated at 118 compared with 140 the previous year. The studios have also broken up their "mini-majors", thus making room for foreign productions, with European films like *Slumdog Millionaire* or *Taken* among the first to benefit. Most studios deny in public that there will be a reduction in the number of releases in 2010 and 2011 but, as *Variety* recently noted, "privately, most foresee a change".

What future for the home video market?

The optimism of those who claimed the film sector was recession proof must be qualified all the more as the resources of this sector are not only based on box office receipts but also, to the tune of an estimated 40 to 50%, on home video receipts. However, the home video market is evolving.

The crisis on the DVD market is currently plain to see: in the United States, DVD sales fell from 24 billion US dollars in 2006 to 22 billion in 2008. Depending on the source, the decline in 2008 compared with 2007 was 8.4% (NATO), 9% (Digital Entertainment Group) or even 11% (Screen Digest). This recession has not been compensated for by sales of Blu-ray Discs, which rose from 270 million US dollars in 2007 to 750 million US dollars in 2008.

According to Screen Digest, the rapid rise of the Blu-ray Disc (BD) has only partially compensated for this decline: total sales in fact fell by 9%, compared with an 11% decline in DVD sales alone. The rental market was more resistant: it fell by just 0.3% (including BDs) and 2.6% (excluding BDs). In U.S., the stabilisation of the rental market is all the more surprising as it has occurred after six consecutive years of decline. The better performance of the rental market could be explained by the rise in the number of internet rental services offered by companies and by the success of rental vending machines. The number of subscribers to the Netflix service rose from 6.3 million in 2006 to 10 million at the beginning of 2009, while Redbox – which works in association with McDonald's and Wal-Mart – increased its network of kiosks from 2,300 in 2006 to 13,700 at the beginning of 2009 and is aiming to have 20,000 at the end of the year.

In Europe, the first national figures available show contrasting results. In the United Kingdom, according to the first BVA estimates, the number of DVDs sold rose by 1.9% in 2008 compared with 2007. However, owing to a drop in the average price, the value of the market went down by 2.5%. Sales of Blu-ray Discs were higher than anticipated (3.7 million). In France, sales recorded a decline for the fourth year running, with a fall in value of 7.5% to 1.38 billion euros and a fall in volume of 5.5%. This means that the market has lost nearly one-third, or 600 million euros, in four years. According to SEVN, this fall in value would have been higher (around 10%) without the first encouraging figures for sales of Blu-ray Discs, which quadrupled in 2008. In Germany, purchases of DVDs dropped by 5.4% in value and 1.9% in unit terms. The money spent on Blu-ray Discs amounted to 43 million euros, thus reducing the decline in sales when all formats are taken together to 2.2%. In Italy, DVD sales dropped by 15.5% in value and 13.9% in volume.

According to Screen Digest, the stabilisation of the rental market in the U.S. does not seem to extend to other markets. The decline in DVD rentals in the Eurozone was 12% in euro terms and 6% in dollar terms and in the United Kingdom 9.5% in pounds sterling and 16.2% in dollars. In Japan, rentals increased by 13.8% in dollar terms but actually dropped slightly by 0.1% when calculated in yen. In Europe, internet rentals are already available but seem destined to remain more marginal than in the United States and distribution by rental vending machines is already a well-established feature. The development potential of rentals thus seems to be lower than in the United States, especially as the rental segment appears threatened by the slow but noticeable upsurge of VOD. Ultimately, the stabilisation of the rental market in the United States would be more an indicator of the fact that consumers have stopped building up their personal video libraries and are therefore ready for the dematerialised consumption represented by VOD.

Hardware manufacturers dominate the VOD market

It is still not easy to assess the development of the VOD market because almost no data are supplied by the service providers or collected by the national cinema agencies. According to Screen Digest, sales or rentals of films available as VOD constitute a market of 156 million US dollars in the United States and 38 million US dollars in Europe and are likely to be ten times higher in 2013. In Europe, the different types of player (telecommunications operators, cable operators, broadcasters, retailers, producers, film libraries, etc) invested money on this new market in 2007-2008. However, it is the IT and video games companies, such as Apple, Microsoft, Sony and Nintendo, that now seem best placed. According to Screen Digest, the Apple iTunes Stores, which offer a catalogue of 2,500 films, 600 of them in HD, in North America, the United Kingdom, Australia and New Zealand, are already the world leader for VOD devoted

to the cinema. Film catalogues will probably be progressively introduced in iTunes Stores in other countries, as was demonstrated by the recent launch of a service in Germany. The producers of games consoles are also trying to move into film downloads. When connected to the internet, Microsoft's Xbox 360 or Sony's PlayStation 3 already offer catalogues of films. According to *Variety*, Sony has registered more than 380 million downloads (free and paid) through the online PlayStation Network service of its PS3 console. VOD, which is only available in the United States, is said to have earned the company around 180 million US dollars in one year. Microsoft has been offering a VOD service in Europe for the past eighteen months but the company does not provide any figures on download volumes. Nintendo is considering launching a service in Japan. In the United States, the iTunes Stores and Microsoft's Xbox service are said to account for 85% of all transactions, while in Europe, the two services are reported to have a 16% market share already, despite their very recent and still limited rollout, and will probably have 65% of the market from 2010. This domination by two players that are also manufacturers is already leading to some critical assessments: as their main objective is to sell their hardware, the two companies could afford to cut the prices of films at the expense of their competitors. Even if it is the leading model, operators appear to be disillusioned by iTunes Stores results. At the launch of its catalogue on the platform in September 2006, Disney announced target first-year revenues of 50 million US dollars. This implies, roughly speaking, a target of 25 million downloads at 1.99 US dollars. At the end of July 2008, Disney discreetly admitted that only 5 million films had been sold to date and VOD sales were qualified as "incremental". Over the last few months, Apple has been even more low-key in the publication of data on film downloads.

Speculation is rife among analysts and professionals as to the respective chances that the Blu-ray Disc and VOD in high definition have of winning the favour of consumers. Recent announcements such as an on-demand DVD manufacturing service proposed by Warner for its film library, film downloads to SD memory cards as announced by MOD Systems and Toshiba, or a new cable connecting iPods and and HD TV sets announced by Apple, show that the challenges of distributing films through new digital technologies are greater than ever. In the absence of detailed data, the honest observer can only call for a little more transparency on the operators' part before offering an assessment. If that transparency is not assured, then the strategic choices, investments and development policies will remain risky. And those who defend unauthorised downloading will have a good hand when it comes to continuing to argue that the unwarranted profits earned by the industry justify their practice of free consumption – but that is another story…

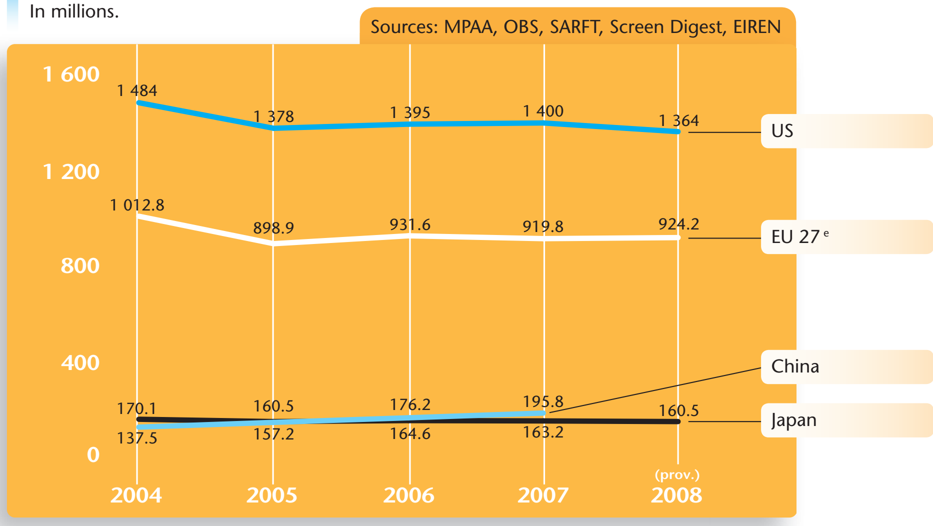
The observer's watchword will therefore remain "slow and cautious", even if that does not provide a very attractive film title. Well, I was just pitching…

André Lange

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

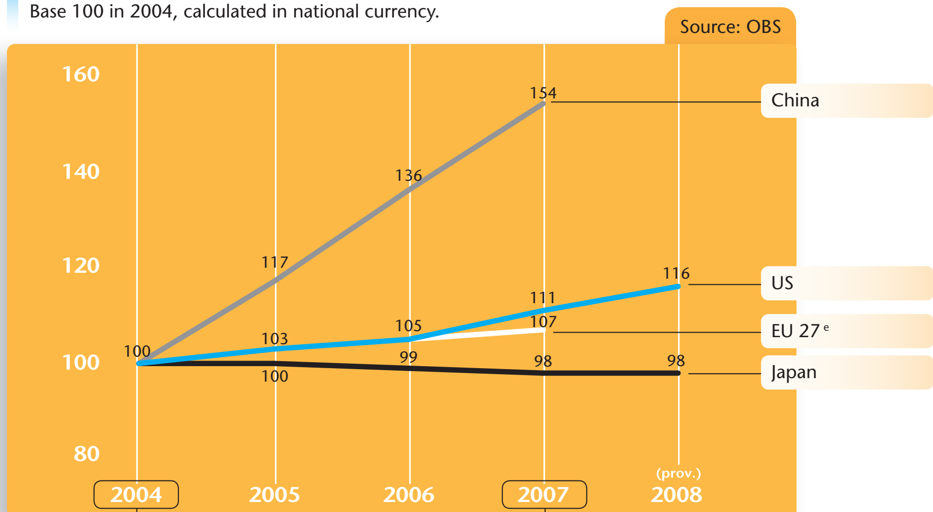
Admissions | 2004-2008

In millions.



Evolution of average ticket prices | 2004-2008

Base 100 in 2004, calculated in national currency.

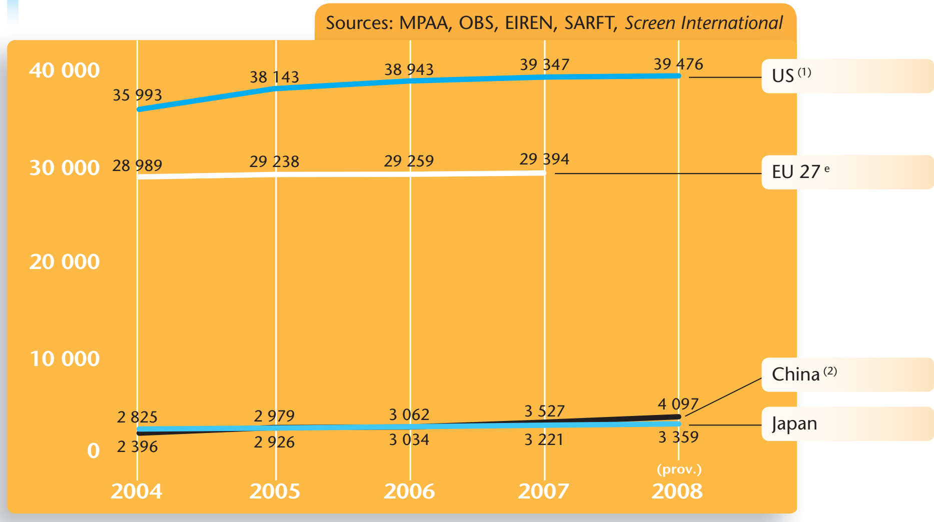


2004	
EU 27:	7.02 USD
US:	6.21 USD
JP:	11.46 USD
CN:	1.32 USD

2007	
EU 27:	8.31 USD
US:	6.88 USD
JP:	10.32 USD
CN:	2.21 USD

World

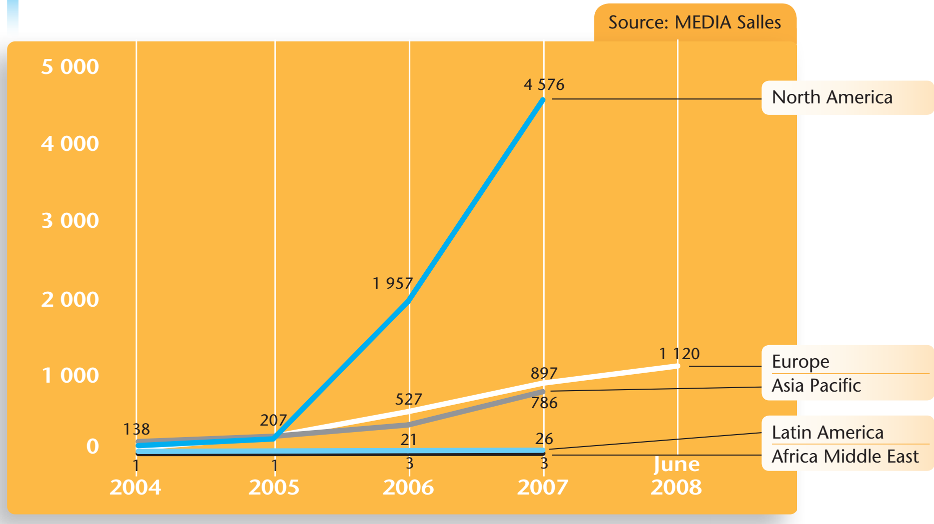
Number of screens | 2004-2008



(1) Excluding drive-in screens.

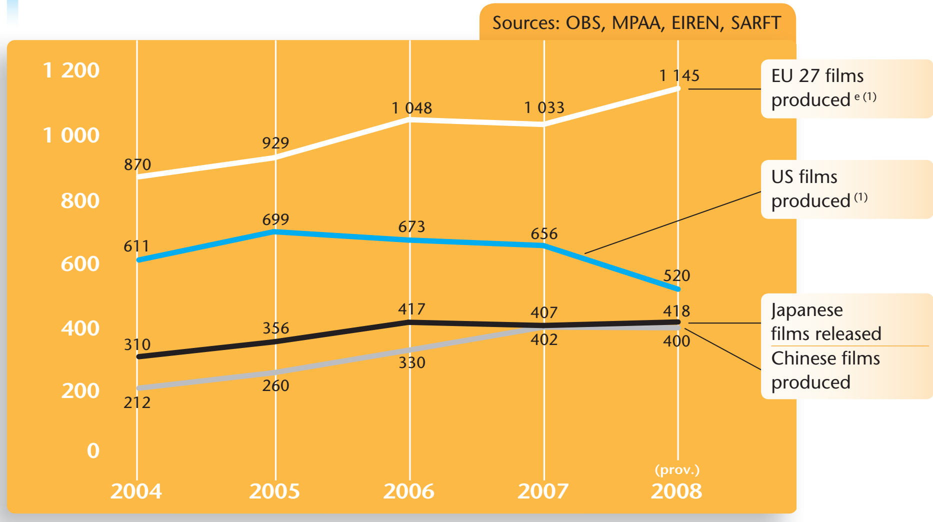
(2) Modern screens.

Number of digital screens | 2004-2008



Note: Data refers to digital screens equipped with DLP Cinema and CineAlta 4K technology.

Number of feature films produced | 2004-2008



(1) Revised series.

Top 20 films worldwide by gross box office | 2008

USD million.

	Original title	Country of origin	North American box office	International box office	Total
1	The Dark Knight [1]	US/GB inc	531	466	997
2	Indiana Jones and the Kingdom…	US	317	470	787
3	Kung Fu Panda	US	215	416	631
4	Hancock	US	228	396	624
5	Iron Man	US	318	264	582
6	Mamma Mia! [1]	US/GB inc	144	429	573
7	Quantum of Solace [1]	GB inc/US	166	380	546
8	WALL·E [1]	US	224	289	513
9	Madagascar: Escape 2 Africa [1]	US	176	305	481
10	The Chronicles of Narnia: Prince Caspian	GB inc/US	142	278	420
11	Sex and the City	US	153	257	410
12	The Mummy: Tomb of the Dragon…	US/DE	102	290	392
13	Wanted	US/DE/RU	135	210	345
14	Horton Hears a Who!	US	155	143	298
15	10,000 BC	US/GB inc	95	175	270
16	The Incredible Hulk	US	135	128	263
17	Twilight [1]	US	172	88	260
18	Bienvenue chez les Ch'tis [1]	FR	2	242	244
19	High School Musical 3: Senior Year [1]	US	90	151	241
20	Get Smart	US	130	100	230

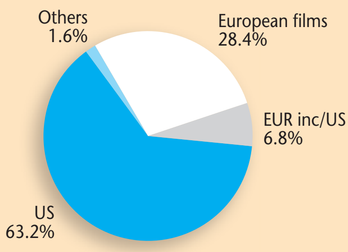
(1) Still on release in 2009.

Source: *Variety*

European Union

Population 2008 e	499.7 million
GDP per capita 2008 e	38 413 USD
Average USD/EUR exchange rate 2008	1 USD = 0.68 EUR
Admissions 2008 e	924.2 million
Average admissions per capita 2008 e	1.85
Average ticket price 2007 e	6.07 EUR (8.31 USD)
Screens 2007 I 2008	29 394 I ~
Screens in multiplexes 2007 I 2008	11 541 I ~
Digital screens 2007 I June 2008	811 I 1 006
Film VOD services 2007 I 2008	~ I 240

Market shares 2008 e



EU production up again

In order to improve the comparability of production data across countries the European Audiovisual Observatory has revised its methodology for counting European feature film productions. The revised series aims to distinguish clearly between fiction films and feature documentaries. Having declined slightly for the first time in years in 2007, the Observatory estimates that production levels in the European Union grew from 1 033 to 1 145 in 2008. An estimated total of 878 fiction feature films and 267 feature documentaries were produced in 2008. The number of 100% national fiction films continued to increase from 632 to 675 in 2008, while the number of fiction co-productions remained fairly stable at 203. Overall growth was primarily the result of rising production volumes in Italy (+37), Ireland (+16), Germany (+12) and France (+11).

Admissions stable

After a small drop in 2007, admissions in the European Union increased marginally by 0.5% from 920 million to around 924 million in 2008. Successful national films underpinned positive results in France (+6.7%), Germany (+3%) and the UK (+1.1%). In contrast, admissions dropped by an estimated -4.1% in Italy and by -7.8% in Spain. Double-digit growth in ticket sales were registered in Bulgaria, Romania and Slovakia while the Nordic EU members also reported positive results.

Unchanged demand for EU films

European films achieved an estimated market share of 28.4%, slightly down from 28.6% in 2007. Market share for European films produced in Europe with incoming US investment, such as *Quantum of Solace,* rose from 6.3% to 6.8% while US films remained stable at 63.2%. The most successful European films were *Quantum of Solace*, attracting an audience of over 25.8 million across the European Union, followed by French comedy *Bienvenue chez les Ch'tis* which sold 23.5 million tickets. Non-national admissions accounted for about 41% of total admissions to the top 20 European films.

EU digital screen base grows strongly

According to figures provided by MEDIA Salles digital screens in the European Union increased by 24% from 811 in 2007 to 1 006 digital screens by mid-2008. With 298 units, the United Kingdom remains the country with the largest digital screen base, followed by Germany (164) and France (162). While many countries are still working on the development of schemes to support the transition to digital, French exhibitor CGR's decision to go ahead with the conversion of its approx. 400 screens was a major growth driver for digital cinema in France. With other larger exhibition chains following CGR's example, spurred by national initiatives like in Poland, and the driving force of 3D cinema, Europe's digital screen base is expected to continue its growth trend throughout the year.

240 film VOD services

The Observatory estimates that there were about 240 VOD services offering feature films operational in the European Union member states as of November 2008. The largest number of film VOD services were to be found in France (43) followed by the Netherlands (28), Germany (22) and the UK (20).

Source: OBS, MEDIA Salles

Information on the number of European digital screens is provided by MEDIA Salles and refers uniquely to digital screens equipped with DLP Cinema and CineAlta 4K technology.

Number of feature films produced in the European Union | 2004-2008

In units.

Country		2004	2005	2006	2007	prov. 2008	Sources
Austria	100% national fiction	~	5	8	4	7	OFI
	maj. co-prod. fiction	~	4	8	2	8	OFI
	min. co-prod. fiction	~	3	0	6	0	OFI
	Feature documentaries	~	18	17	20	13	OFI
Belgium [e]	100% national fiction	6	10	11	20	13	MFB, OBS
	maj. co-prod. fiction	11	10	14	11	14	MFB, OBS
	min. co-prod. fiction	31	20	32	27	23	MFB, OBS
	Feature documentaries	5	6	10	13	14	MFB, OBS
Bulgaria	100% national fiction	3	2	4	4	2	NFC
	maj. co-prod. fiction	0	1	3	1	3	NFC
	min. co-prod. fiction	4	3	3	5	4	NFC
	Feature documentaries	1	7	5	3	6	NFC
Czech Republic	100% national fiction	19	17	28	18	18	Min.Cult.
	maj. co-prod. fiction	1	4	1	5	5	Min.Cult.
	min. co-prod. fiction	1	6	6	0	4	Min.Cult.
	Feature documentaries	~	4	10	7	12	Min.Cult.
Denmark [(1)]	100% national fiction	13	13	13	8	14	DFI
	maj. co-prod. fiction	9	7	7	9	6	DFI
	min. co-prod. fiction	7	4	4	7	6	DFI
	Feature documentaries	~	7	9	4	19	DFI
Estonia	100% national fiction	1	6	6	8	3	EFSA, OBS
	maj. co-prod. fiction	1	~	2	3	1	EFSA, OBS
	min. co-prod. fiction	1	~	2	1	1	EFSA, OBS
	Feature documentaries	11	~	1	1	15	EFSA, OBS
Finland	100% national fiction	10	8	11	8	11	FFF
	maj. co-prod. fiction	3	3	3	4	5	FFF
	min. co-prod. fiction	6	4	5	3	4	FFF
	Feature documentaries	9	4	2	2	3	FFF
France	100% national	130	126	127	133	145	CNC
	maj. co-prod.	37	61	37	52	51	CNC
	min. co-prod.	36	53	39	43	44	CNC
Germany	100% national fiction	60	60	78	77	81	SPIO
	maj. co-prod. fiction	27 [(2)]	18	20	16	15	SPIO
	min. co-prod. fiction		25	24	29	29	SPIO
	Feature documentaries	34	43	52	50	60	SPIO
Greece [e]	100% national	15	21	18	20	27	GFC, OBS
	maj. co-prod.	3	2	2	0	2	GFC, OBS
	min. co-prod.	3	1	2	5	2	GFC, OBS
Hungary	100 % national	19	17	37	26	25	Min.Cult., AHFD, NFO
	maj. co-prod.	4	1	9	2	2	Min.Cult., AHFD, NFO
	min. co-prod.	3	8	0	0	3	Min.Cult., AHFD, NFO
Ireland	Total fiction	13	12	17	10	25	IFB
	Total feat. documentaries	0	5	9	13	14	IFB
Italy	100 % national	97	70	90	93	128	CCH
	maj. co-prod.	18	13	12	16	18	CCH
	min. co-prod	23	15	15	14	9	CCH
Latvia	100% national fiction	2	2	0	5	2	NFCL
	maj. co-prod. fiction	1	0	2	0	0	NFCL
	min. co-prod. fiction	0	2	2	1	1	NFCL
	Feature documentaries	0	0	2	1	3	NFCL

Continued overleaf

Continued

Number of feature films produced in the European Union | 2004-2008

In units.

Country		2004	2005	2006	2007	*prov.* 2008	Sources
Lithuania	100% national fiction	1	0	1	2	6	Min.Cult., Baltic Films
	maj. co-prod. fiction	0	1	2	0	0	Min.Cult., Baltic Films
	min. co-prod. fiction	0	1	0	0	0	Min.Cult., Baltic Films
Luxembourg	100% national fiction	1	1	0	0	0	LFF
(1)	maj. co-prod. fiction	2	1	3	2	0	LFF
	min. co-prod. fiction	11	11	9	2	11	LFF
	Feature documentaries	1	0	2	4	2	LFF
The	100% national fiction	16	23	16	16	19	NFF, NVF, OBS
Netherlands	maj. co-prod. fiction	3	5	6	6	7	NFF, NVF, OBS
e	min. co-prod. fiction	5	3	8	8	2	NFF, NVF, OBS
	Feature documentaries	12	20	17	10	7	NFF, NVF, OBS
Poland	100% national fiction	17	19	23	30	29	PISF, Min.Cult., OBS
	maj. co-prod. fiction	0	2	1	4	4	PISF, Min.Cult., OBS
	min. co-prod. fiction	3	2	2	5	8	PISF, Min.Cult., OBS
	Feature documentaries	0	0	1	1	5	PISF, Min.Cult., OBS
Portugal	100% national fiction	7	8	3	8	6	ICA
	maj. co-prod. fiction	4	3	11	4	7	ICA
	min. co-prod. fiction	4	4	7	0	1	ICA
	Feature documentaries	7	8	13	3	2	ICA
Romania	100% national fiction	9	9	14	9	7	CNC
	maj. co-prod. fiction	2	2	2	0	2	CNC
	min. co-prod. fiction	10	9	2	3	0	CNC
Slovakia	100% national fiction	0	1	0	3	1	SKFI
	maj. co-prod. fiction	1	1	0	2	3	SKFI
	min. co-prod. fiction	1	4	2	3	3	SKFI
	Feature documentaries	0	2	1	2	4	SKFI
Slovenia	100% national fiction	5	6	1	4	9	FSRS
	maj. co-prod. fiction	0	1	0	3	0	FSRS
	min. co-prod. fiction	1	2	3	3	3	FSRS
	Feature documentaries	0	1	0	2	3	FSRS
Spain	100 % national	92	89	109	115	124	ICAA
	maj. co-prod.	15	29	23	26	26	ICAA
	min. co-prod.	26	24	18	31	23	ICAA
Sweden	100% national fiction	19	27	29	15	8	SFI, OBS
	maj. co-prod. fiction	12	15	12	10	13	SFI, OBS
	min. co-prod. fiction	7	8	2	7	1	SFI, OBS
	Feature documentaries	5	3	3	5	13	SFI, OBS
United	100 % national	28	50	56	68	66	UKFC, OBS
Kingdom	maj. co-prod.	22	18	21	14	11	UKFC, OBS
	min. co-prod.	66	53	32	14	9	UKFC, OBS
	Inward feature (2)	17	42	26	27	16	UKFC, OBS
Total fiction films EU 27 e (3)		**723**	**736**	**839**	**824**	**878**	OBS
Total feat. documentaries EU 27 e (4)		**147**	**193**	**209**	**209**	**267**	OBS
Total feature films EU 27 e (5)		**870**	**929**	**1 048**	**1 033**	**1 145**	OBS

(1) Revised series based on year of funding.

(2) Excluding inward features involving only VFX work in the UK.

(3) May include feature documentaries in IT, GR, HU.

(4) May double-count minority co-produced feature documentaries. No detailed data for feature documentaries available for ES, IT, GR, HU, LT, RO.

(5) Revised series.

Admissions in the European Union | 2004-2008

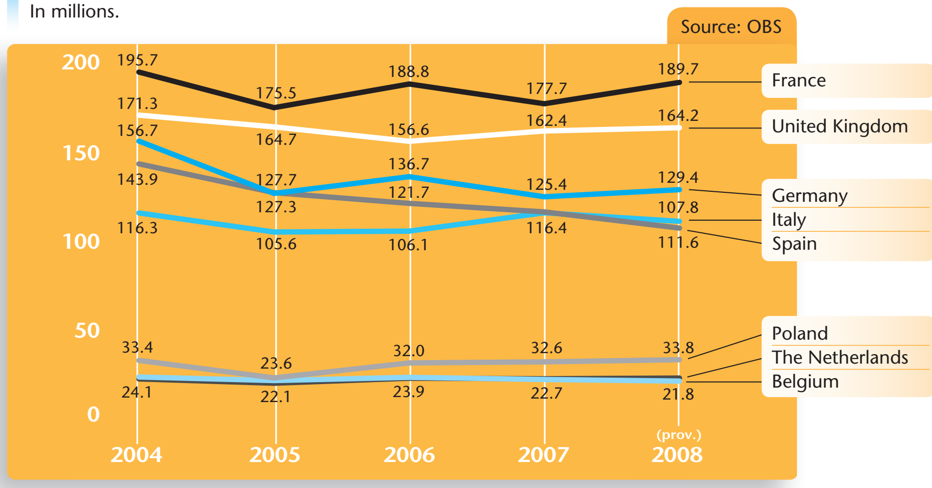
In millions.

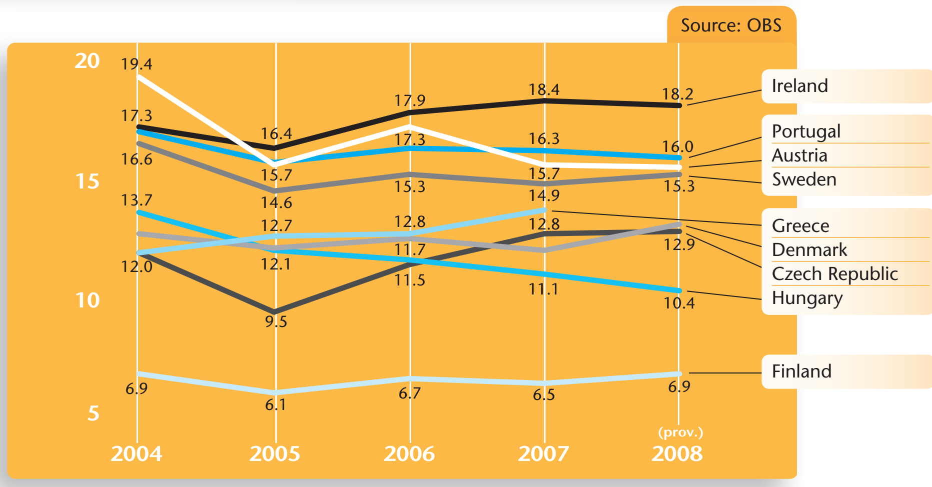
Country	2004	2005	2006	2007	*prov.* 2008	2008/07
Austria	19.4	15.7	17.3	15.7	15.6	-0.4%
Belgium [e]	24.1	22.1	23.9	22.7	21.8	-3.7%
Bulgaria	3.1	2.4	2.4	2.5	2.8	14.2%
Cyprus	1.0	0.8	0.8	0.9	~	~
Czech Republic	12.0	9.5	11.5	12.8	12.9	0.4%
Denmark	12.8	12.2	12.6	12.1	13.2	8.9%
Estonia	1.2	1.1	1.6	1.6	1.6	0.2%
Finland	6.9	6.1	6.7	6.5	6.9	5.3%
France	195.7	175.5	188.8	177.7	189.7	6.7%
Germany	156.7	127.3	136.7	125.4	129.4	3.2%
Greece [e]	12.0	12.7	12.8	13.8	~	~
Hungary	13.7	12.1	11.7	11.1	10.4	-6.9%
Ireland	17.3	16.4	17.9	18.4	18.2	-0.7%
Italy [e]	116.3	105.6	106.1	116.4	111.6	-4.1%
Latvia	1.7	1.7	2.1	2.4	2.4	-2.7%
Lithuania	1.4	1.2	2.4	3.2	3.3	1.2%
Luxembourg	1.4	1.2	1.3	1.2	~	~
Malta [e]	1.0	1.0	0.9	1.0	~	~
Poland	33.4	23.6	32.0	32.6	33.8	3.4%
Portugal	17.1	15.8	16.4	16.3	16.0	-2.0%
Romania	4.0	2.8	2.8	2.9	3.8	29.7%
Slovakia	2.9	2.2	3.4	2.8	3.4	21.3%
Slovenia	3.0	2.4	2.7	2.4	2.4	0.5%
Spain	143.9	127.7	121.7	116.9	107.8	-7.8%
Sweden	16.6	14.6	15.3	14.9	15.3	2.1%
The Netherlands	23.0	20.6	23.4	23.1	23.5	2.0%
United Kingdom	171.3	164.7	156.6	162.4	164.2	1.1%
EU 27 [e]	**1 012.9**	**898.9**	**931.6**	**919.8**	**924.2**	**0.5%**

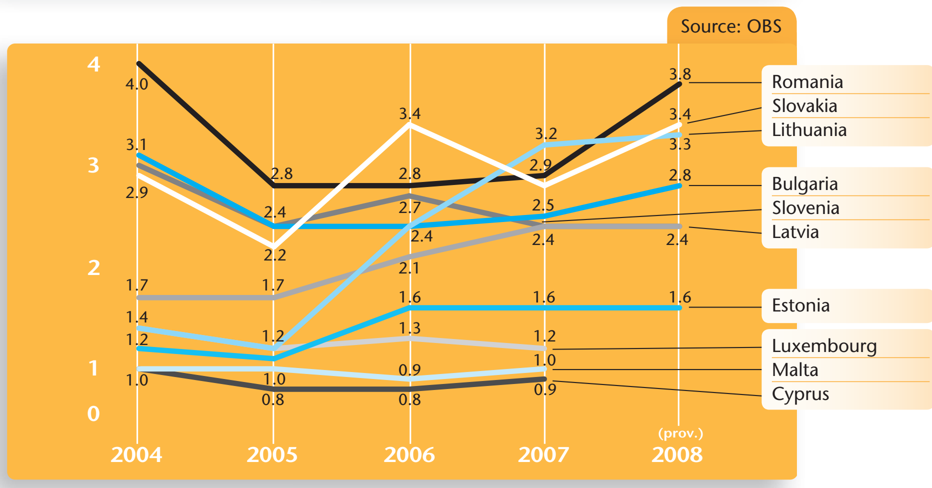
Source: OBS

Admissions in the European Union | 2004-2008

In millions.

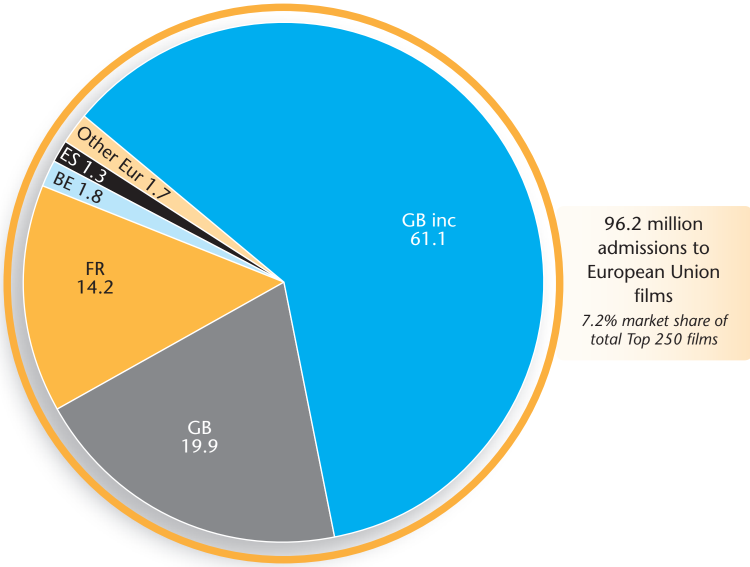






Admissions to European Union films on the North American market | 2008 e

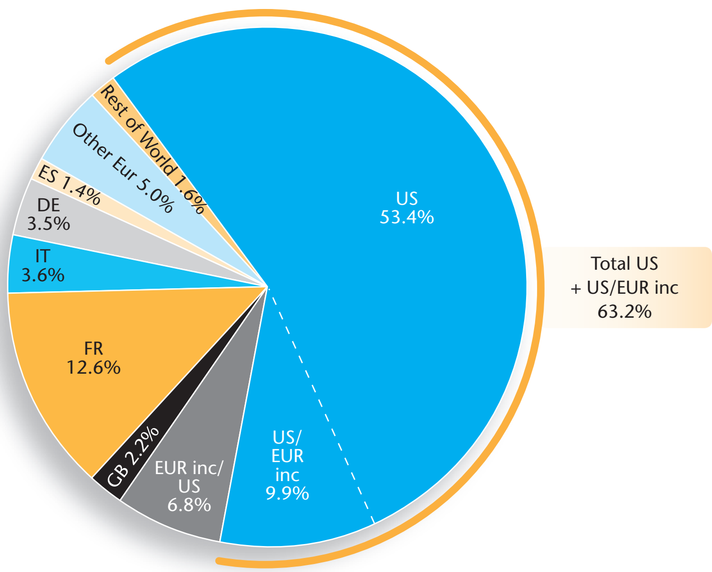
In millions. Estimated admissions in the United States and Canada based on an average ticket price of USD 7.18.



Note: Based on Top 250 films in United States of America and Canada.
'Inc' refers to films produced in Europe with US inward investment.

Sources: *Variety*, OBS

Breakdown of European Union admissions by the origin of films | 2008 *prov.*



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

Sources: OBS, LUMIERE

European Union

The tables below are provisional rankings on the basis of data from 22 European Union member states – around 88% of total admissions in the European Union are analysed.

Top 25 films by admissions in the European Union | 2008

	Original title	Country of origin	Year	Director	Admissions
1	Mamma Mia!	US/GB inc	2008	Phyllida Lloyd	31 787 609
2	Quantum of Solace	GB inc/US	2008	Marc Forster	25 845 988
3	Indiana Jones and the Kingdom…	US	2008	Steven Spielberg	25 381 221
4	Madagascar: Escape 2 Africa	US	2008	Eric Darnell, Tom McGrath	23 694 470
5	Bienvenue chez les Ch'tis	FR	2008	Dany Boon	23 467 414
6	The Dark Knight	US/GB inc	2008	Christopher Nolan	23 268 940
7	Kung Fu Panda	US	2008	M. Osborne, J. Stevenson	21 146 904
8	Hancock	US	2008	Peter Berg	19 708 754
9	WALL·E	US	2008	Andrew Stanton	18 094 226
10	Sex and the City	US	2008	Michael Patrick King	15 534 309
11	High School Musical 3: Senior Year	US	2008	Kenny Ortega	14 121 268
12	Astérix aux jeux olympiques	FR/DE/ES/IT	2008	F. Forestier, T. Langmann	12 944 345
13	The Chronicles of Narnia: Prince Caspian	GB inc/US	2008	Andrew Adamson	12 716 118
14	The Mummy: Tomb of the Dragon Emperor	US/DE	2008	Rob Cohen	10 981 221
15	Iron Man	US	2008	Jon Favreau	9 992 132
16	Horton Hears a Who!	US	2008	J. Hayward, S. Martino	9 000 383
17	National Treasure: Book of Secrets (1)	US	2007	Jon Turteltaub	8 300 055
18	I Am Legend (2)	US	2007	Francis Lawrence	7 617 879
19	What Happens in Vegas	US	2008	Tom Vaughan	7 415 513
20	Burn After Reading	US/GB	2008	Joel Coen, Ethan Coen	7 362 316
21	10,000 BC	US/GB inc	2008	Roland Emmerich	6 952 127
22	Wanted	US/DE/RU	2008	Timur Bekmambetov	6 493 126
23	Twilight	US	2008	Catherine Hardwicke	6 470 058
24	No Country for Old Men	US	2007	Joel Coen, Ethan Coen	6 344 809
25	Jumper	US	2008	Doug Liman	6 310 087

(1) 1 950 949 admissions in EU in 2007. (2) 7 026 965 admissions in EU in 2007. Sources: OBS-LUMIERE

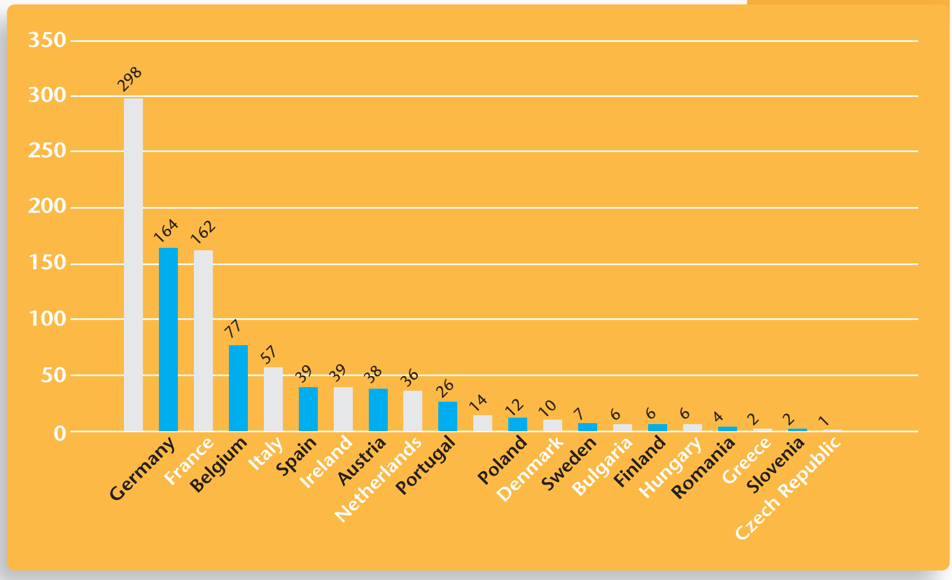
Top 25 European Union films by admissions in the European Union | 2008

	Original title	Country of origin	Year	Director	Admissions
1	Quantum of Solace	GB inc/US	2008	Marc Forster	25 845 988
2	Bienvenue chez les Ch'tis	FR	2008	Dany Boon	23 467 414
3	Astérix aux Jeux olympiques	FR/DE/ES/IT	2008	F. Forestier, T. Langmann	12 944 345
4	The Chronicles of Narnia: Prince Caspian	GB inc/US	2008	Andrew Adamson	12 716 118
5	Keinohrhasen (1)	DE	2007	Til Schweiger	5 123 519
6	Sweeney Todd: The Demon Barber…	GB inc/US	2007	Tim Burton	5 022 800
7	Earth (2)	GB/DE	2007	A. Fothergill, M. Linfield	3 903 142
8	Die Welle	DE	2008	Dennis Gansel	2 883 443
9	The Boy in the Striped Pyjamas	GB inc/US	2008	Mark Herman	2 830 258
10	Taken	FR	2008	Pierre Morel	2 820 089
11	Natale a Rio	IT	2008	Neri Parenti	2 777 062
12	Gomorra	IT	2008	Matteo Garrone	2 675 909
13	Der Baader Meinhof Komplex	DE/FR/CZ	2008	Uli Edel	2 650 626
14	Lejdis	PL	2008	Tomasz Konecki	2 529 122
15	Disco	FR	2008	Fabien Onteniente	2 524 015
16	Babylon A.D.	FR/US	2008	Mathieu Kassovitz	2 461 085
17	Mesrine, l'instinct de mort	FR/CA/IT	2008	Jean-François Richet	2 355 405
18	Enfin veuve	FR	2007	Isabelle Mergault	2 305 756
19	Paris	FR	2008	Cédric Klapisch	2 246 212
20	Grande, grosso e Verdone	IT	2008	Carlo Verdone	2 173 688
21	Scusa ma ti chiamo amore	IT	2008	Federico Moccia	2 098 498
22	Entre les murs	FR	2008	Laurent Cantet	2 069 800
23	Transporter 3	FR	2008	Olivier Megaton	1 958 253
24	In Bruges	GB inc/US	2008	Martin McDonagh	1 886 052
25	The Oxford Murders	ES/GB/FR/RU	2008	Álex de la Iglesia	1 884 713

(1) 1 485 043 admissions in EU in 2007. (2) 1 905 458 admissions in EU in 2007.
Note: 'inc' refers to films produced in Europe with US inward investment. Sources: OBS, LUMIERE

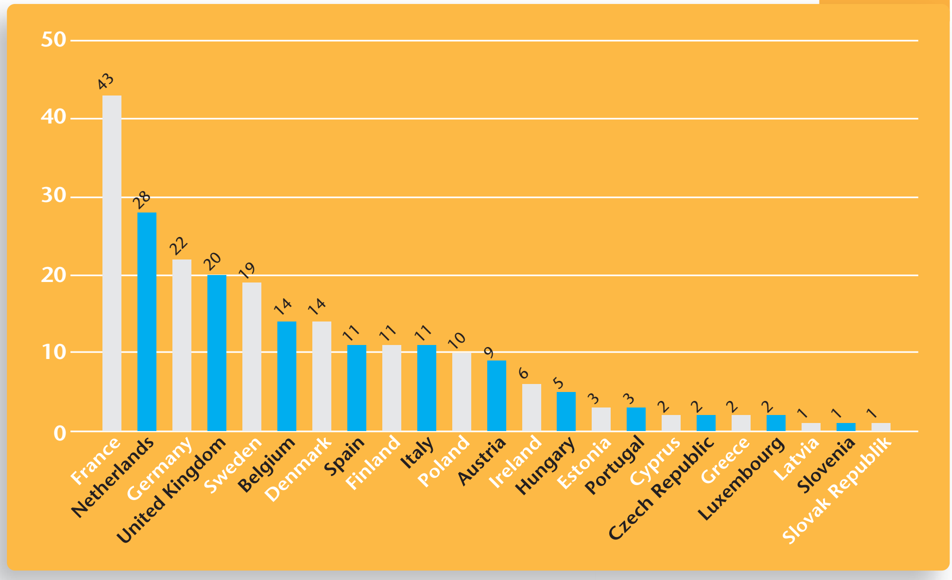
Number of digital screens in European Union by country | June 2008

Source: MEDIA Salles



Number of VOD services offering films in their catalogue | November 2008

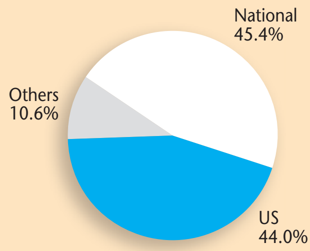
Source: OBS



France

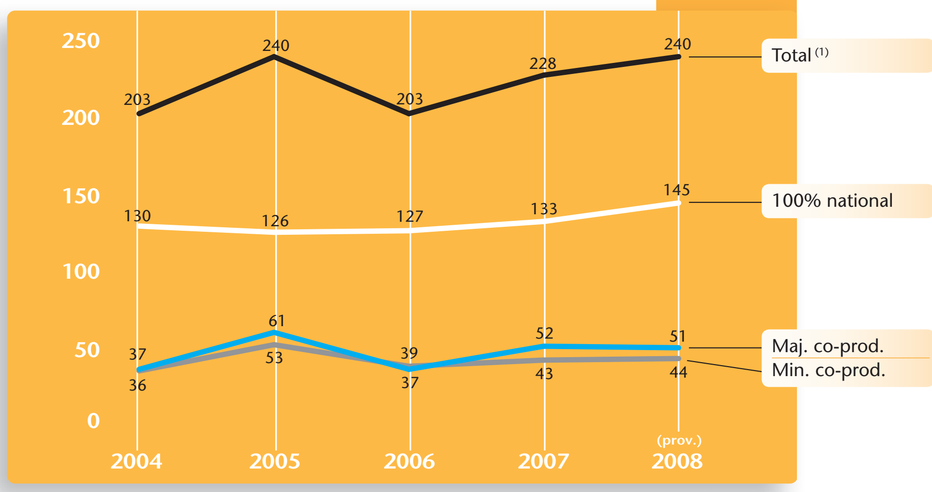
Population 2008 e	62.0 million
GDP per capita 2008 e	48 012 USD
Average USD/EUR exchange rate 2008	1 USD = 0.68 EUR
Admissions 2008 e	189.7 million
Average admissions per capita 2008	3.06
Average ticket price 2008 e	6.01 EUR (8.79 USD)
Screens 2007 | 2008	5 398 | 5 426
Screens in multiplexes 2007 | 2008	1 810 | ~
Digital screens 2007 | June 2008	66 | 162
Film VOD services 2007 | 2008	~ | 43

Market shares 2008 e



Number of feature films produced | 2004-2008

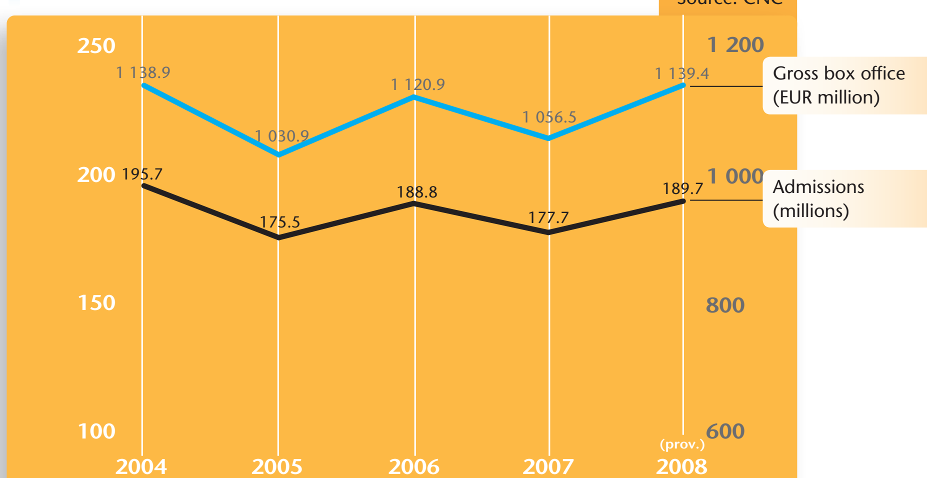
Source: CNC



(1) Officially recognised films.

Admissions and gross box office | 2004-2008

Source: CNC



Top 20 films by admissions in France | 2008

	Original title	Country of origin	Director	Distributor	Admissions
1	Bienvenue chez les Ch'tis	FR	Dany Boon	Pathé Distribution	20 449 865
2	Astérix aux jeux olympiques	FR/DE/ES/IT	Forestier, Langmann	Pathé Distribution	6 812 378
3	Madagascar: Escape 2 Africa	US	Darnell, McGrath	Paramount Pictures	4 242 192
4	Indiana Jones and the Kingdom…	US	Steven Spielberg	Paramount Pictures	4 192 618
5	Quantum of Solace	GB inc/US	Marc Forster	Sony Pict. Releasing	3 721 442
6	WALL·E	US	Andrew Stanton	Walt Disney Studios	3 234 750
7	Kung Fu Panda	US	Osborne, Stevenson	Paramount Pictures	3 231 135
8	The Chronicles of Narnia…	GB inc/US	Andrew Adamson	Walt Disney Studios	3 115 005
9	Hancock	US	Peter Berg	Sony Pict. Releasing	3 077 695
10	The Dark Knight	US/GB inc	Christopher Nolan	Warner Bros.	3 039 032
11	Disco	FR	Fabien Onteniente	StudioCanal	2 435 015
12	Mesrine, l'instinct de mort	FR	Jean-François Richet	Pathé Distribution	2 268 481
13	Enfin veuve	FR	Isabelle Mergault	Gaumont Distribution	2 261 452
14	Iron Man	US	Jon Favreau	SND Films	2 045 503
15	Sex and the City	US	Michael Patrick King	Metropol. Filmexport	1 993 359
16	National Treasure: Book of Secrets	US	Jon Turteltaub	Walt Disney Studios	1 988 490
17	High School Musical 3: Senior…	US	Kenny Ortega	Walt Disney Studios	1 889 195
18	Vicky Cristina Barcelona	US/ES	Woody Allen	Warner Bros.	1 868 402
19	Paris	FR	Cédric Klapisch	Mars Dist. (StudioCanal)	1 723 642
20	Horton Hears a Who!	US	Hayward, Martino	20th Century Fox	1 677 368

Source: *Le film français*

Production and Finance

French film production reached a record high in 2008, with 240 films receiving official recognition, 12 more than in 2007. The 2008 total equals the record registered in 2005 (240 films) but the number of French films (entirely national films and majority co-productions) reached an all-time high in 2008, principally due to an increase in the number of entirely French films. Average production costs increased from EUR 5.43 million to EUR 6.42 million and the total value of French initiative production was EUR 1 259 million, up 25.5% from 2007.

Moves were made to bring more foreign production to France, with the introduction of a new 20% tax rebate on local spend for qualifying foreign productions, capped at EUR 4 million per project.

Distribution and Exhibition

Cinema attendance picked up again in France in 2008, after a flat year in 2007. Total admissions rose to 189.7 million, a 6.7% increase on the preceding year, and box office was up 7.7% to EUR 1 139 million. Results were unevenly spread throughout the year, with strong gains in March and April (+57% and +32% respectively year-on-year) followed by a poor summer and a significant recovery in the last quarter. Market share for national films outstripped that for American films for the second time in the last 22 years, reaching an estimated 45.4% of total admissions (44.6% in 2006). The principal contributor to this success was the comedy *Bienvenue chez les Ch'tis* with 20.5 millions tickets sold, the highest all-time total for a French film. Pathé, distributor not only of the *Ch'tis* but also of second-ranked *Astérix aux jeux olympiques*, moved up 7 places to top the list of distributors (19.7% of admissions), ahead of Paramount (9.8%) and Warner Bros. (7.2%). The success of the *Ch'tis* also overshadowed the early part of 2009, with results for the first quarter down 15.2% on 2008.

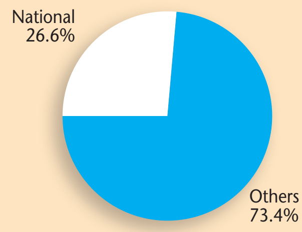
Ways to fight piracy were hotly debated in France during 2008, culminating in controversy and delays in the adoption by Parliament in April 2009 of a new law intended to combat illegal downloads. The debate has reopened negotiations on reducing windows to DVD and VOD releases, with a period of between 4 and 6 months receiving general support among industry groupings.

Sources: CNC, *Le film français, Ecran total*

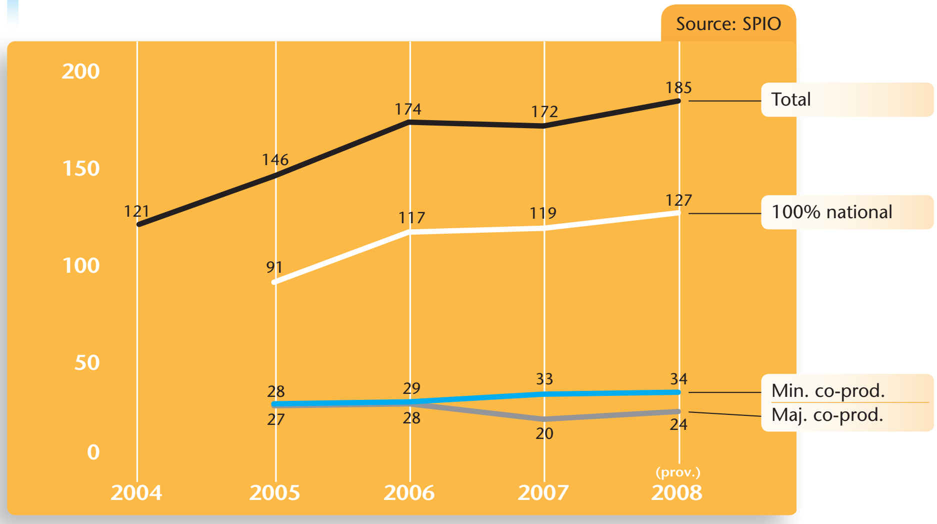
Germany

Population 2008 [e]	82.1 million
GDP per capita 2008 [e]	46 499 USD
Average USD/EUR exchange rate 2008	1 USD = 0.68 EUR
Admissions 2008	129.4 million
Average admissions per capita 2007	1.58
Average ticket price 2008	6.14 EUR (8.99 USD)
Screens 2007 I 2008	4 832 I 4 810
Screens in multiplexes 2007 I 2008	1 284 I ~
Digital screens 2007 I June 2008	151 I 164
Film VOD services 2007 I 2008	~ I 22

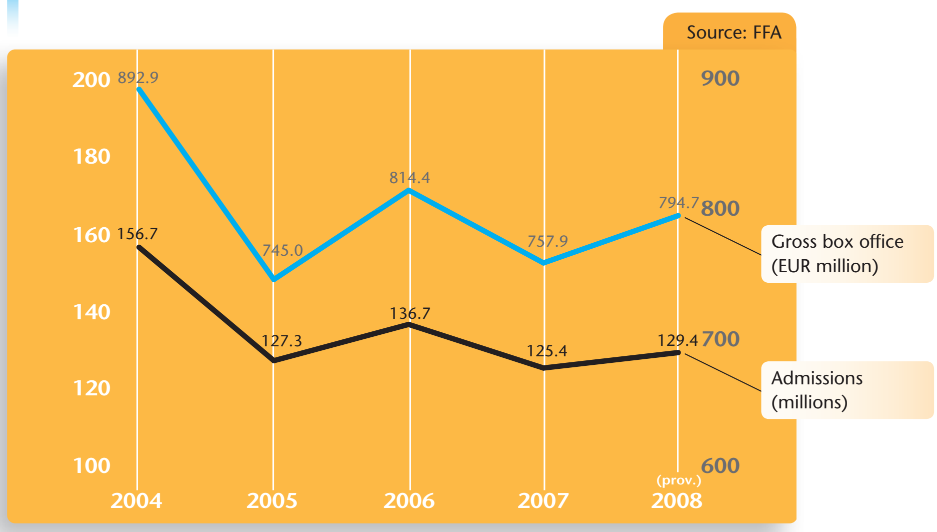
Market shares 2008



Number of German films on first release I 2004-2008



Admissions and gross box office I 2004-2008



Top 20 films by admissions in Germany | 2008

	Original title	Country of origin	Director	Distributor	Admissions
1	Keinohrhasen (1)	DE	Til Schweiger	Warner Bros.	4 878 676
2	Madagascar: Escape 2 Africa (2)	US	Darnell, McGrath	Universal Pictures	4 774 478
3	Quantum of Solace	GB/US	Marc Forster	Sony Pict. Releasing	4 655 312
4	Mamma Mia!	US/GB inc	Phyllida Lloyd	Universal Pictures	4 195 964
5	Hancock	US	Peter Berg	Sony Pict. Releasing	3 846 331
6	Earth	GB/DE	Fothergill, Linfield	Universum Film	3 765 230
7	WALL·E	US	Andrew Stanton	Walt Disney Studios	3 168 267
8	Kung Fu Panda	US	Osborne, Stevenson	Universal Pictures	3 152 561
9	Indiana Jones and the Kingdom…	US	Steven Spielberg	Universal Pictures	2 847 930
10	The Dark Knight	US/GB inc	Christopher Nolan	Warner Bros.	2 808 380
11	Die Welle	DE	Dennis Gansel	Constantin Film	2 635 264
12	Sex and the City	US	Michael Patrick King	Warner Bros.	2 473 566
13	I Am Legend	US	Francis Lawrence	Warner Bros.	2 442 002
14	Der Baader Meinhof Komplex	DE/FR/CZ	Uli Edel	Constantin Film	2 404 734
15	High School Musical 3: Senior Year	US	Kenny Ortega	Walt Disney Studios	2 255 579
16	P.S. I Love You	US	Richard LaGravenese	Tobis Film	2 145 595
17	You Don't Mess with the Zohan	US	Dennis Dugan	Sony Pict. Releasing	1 832 194
18	National Treasure: Book of Secrets	US	Jon Turteltaub	Walt Disney Studios	1 771 200
19	Horton Hears a Who!	US	Hayward, Martino	20th Century Fox	1 751 606
20	Die Wilden Kerle 5	DE	Joachim Masannek	Walt Disney Studios	1 728 229

(1) 1 407 336 in 2007. (2) Still on release in 2009. Source: FFA

Production and Funding

Production activity in Germany increased with a total of 185 German feature films released in 2008, 13 more than in 2007. International co-productions reached new heights with 58 co-productions on screens in 2008, the highest number on record. After two years of existence the German Federal Film Fund (DFFF) has supported 198 film productions with a total of EUR 118.5 million. Films supported split into 71 international co-productions (EUR 62.1 million) and 127 national productions (EUR 56.4 million). The DFFF is planned to be extended until 2012. A new amendment of the Film Subsidies Act (FFG) became effective on January 1, 2009. The revised law includes new regulations shortening the mandatory media windows to 6 months for DVD, 9 months for VOD, 12 months for Pay-TV and 18 months for Free-TV exploitation. A recent decision by the Federal Administrative Court of Germany has created uncertainty with regard to German film funding legislation. While confirming that the FFG was justified in principle, the Court ruled that the current cinema levy used to finance the German Federal Film Board (FFA) was unconstitutional as exhibitors and the home video industry had to pay a cinema levy fixed by law while broadcasters were able to negotiate their financial contribution. This violated the constitutional principle of equal treatment and would have to be remedied.

Distribution and Exhibition

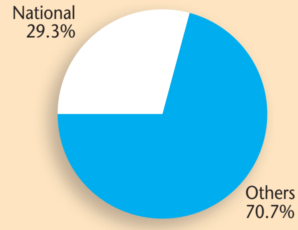
2008 saw admissions increase to 129.4 million tickets sold, up 3.2% from 125.4 in 2007. A slight increase in average ticket price from EUR 6.04 to EUR 6.14 saw box office revenues increase by 4.9% to reach EUR 795 million. National films reached a market share of 26.6% attracting 33.9 million admissions, the highest level on record. Led by *Keinohrhasen* a record high of 11 German films broke the 1 million admissions barrier in 2008. With a market share of 20.2% of total box office UPI became the top distributor in 2008, followed by Warner Bros. (18.7%), Sony Pictures (10.9%) and Disney (10.5%). Total screen numbers continued to fall slowly amounting to 4 810 screens at the end of 2008. Despite the fact that negotiations over a funding scheme to support the digitalisation of German cinemas – the so-called 100 model – are still ongoing, digital screens increased from 151 to 164 in mid-2008.

Sources: FFA, SPIO, *Blickpunkt Film*, *Screen International*, OBS

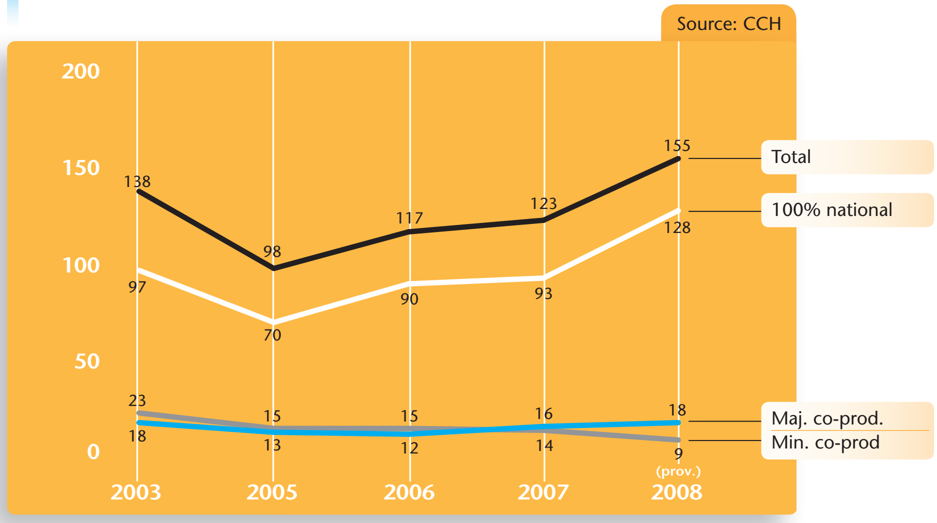
Italy

Population 2008 e	59.3 million
GDP per capita 2008 e	40 450 USD
Average USD/EUR exchange rate 2008	1 USD = 0.68 EUR
Admissions 2008 e	111.6 million
Average admissions per capita 2008	1.88
Average ticket price 2008 e	5.78 EUR (8.45 USD)
Screens 2007 | 2008	3 410 | ~
Screens in multiplexes 2007 | 2008	1 123 | ~
Digital screens 2007 | June 2008	38 | 57
Film VOD services 2007 | 2008	~ | 11

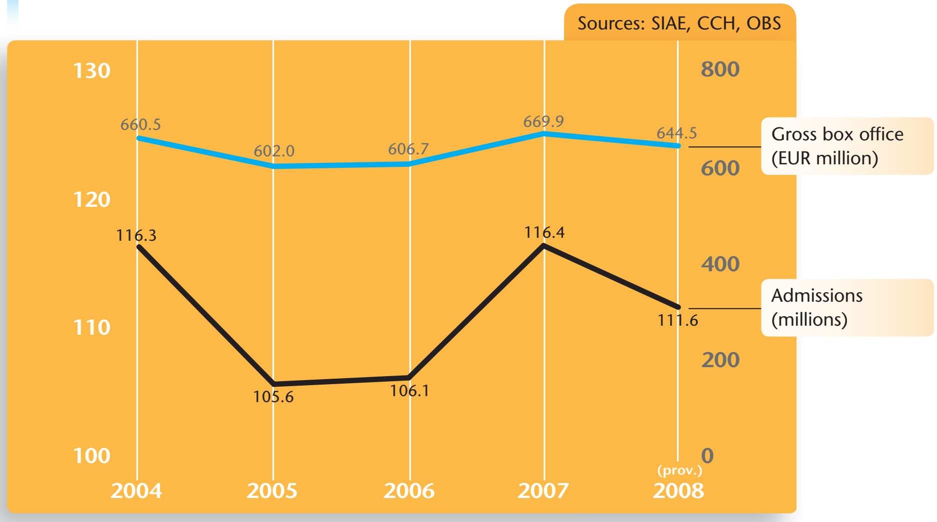
Market shares 2008 e



Number of feature films produced | 2004-2008



Admissions and gross box office | 2004-2008 e



Top 20 films by admissions in Italy | 2008

	Original title	Country of origin	Director	Distributor	Admissions
1	Kung Fu Panda	US	M. Osborne, J. Stevenson	Universal	2 900 661
2	Madagascar: Escape 2 Africa	US	Eric Darnell, Tom McGrath	Universal	2 803 835
3	Natale a Rio	IT	Neri Parenti	Filmauro	2 777 062
4	I Am Legend	US	Francis Lawrence	Warner Bros.	2 216 131
5	Grande, grosso e Verdone	IT	Carlo Verdone	Filmauro	2 173 688
6	Scusa ma ti chiamo amore	IT	Federico Moccia	Medusa Film	2 098 498
7	Hancock	US	Peter Berg	Sony Pictures	1 930 596
8	Indiana Jones and the Kingdom…	US	Steven Spielberg	Universal	1 861 273
9	Twilight	US	Catherine Hardwicke	Eagle Pictures	1 833 861
10	Gomorra	IT	Matteo Garrone	01 Distribution	1 741 626
11	American Gangster	US	Ridley Scott	Universal	1 629 114
12	The Dark Knight	US/GB inc	Christopher Nolan	Warner Bros.	1 588 575
13	High School Musical 3: Senior Year	US	Kenny Ortega	Walt Disney	1 570 485
14	Il Cosmo sul comò	IT	Marcello Cesena	Medusa Film	1 512 267
15	Mamma Mia!	US/GB inc	Phyllida Lloyd	Universal	1 463 513
16	WALL·E	US	Andrew Stanton	Walt Disney	1 455 024
17	The Kite Runner	US	Marc Forster	Filmauro	1 429 864
18	The Chronicles of Narnia: Prince…	GB inc/US	Andrew Adamson	Walt Disney	1 378 324
19	L' Allenatore nel pallone 2	IT	Sergio Martino	Medusa Film	1 273 355
20	Parlez-moi d'amour	FR	Sophie Marceau	01 Distribution	1 254 486

Source: Cinetel

Production and Finance

The resurgence of Italian production was confirmed by figures for 2008. A total of 155 films were completed during the year, of which 27 were co-productions. Entirely national productions were the main vector for growth, with 128 films, 35 films more than in 2007. Digital productions with budgets under EUR 200 000, of which there were 29 in 2008 (5 in 2007) were notable contributors to this total.

In December 2008 the European Commission granted approval for a new EUR 104 million tax shelter and tax credit scheme to run until December 2010. The tax credit and tax shelter are available to companies which are taxable in Italy and the tax credit is available against all types of taxes. Some benefits will be available to foreign productions working through an Italian executive producer. The news was welcome in a difficult context for public funding, with the announcement of a reduction in the 2009 budget of the Fondo unico dello spettacolo (FUS). Cinema funding from the FUS will be EUR 69.7 million, a 23% drop on 2008, although cinema support continues to represent 18.5% of the total fund allocation (19.5% in 2008). A new management team was installed at Cinecittà Holding following radical restructuring and debt reduction, principally through the selling off of the Mediaport exhibition chain. Film promotion body Filmitalia was absorbed into the structure and the Italian government's 24% stake in the Cinecittà studio facilities was put up for sale. The Minister for Culture announced his intention of setting up a self-financing Agenzia Nazionale per il Cinema along the lines of the French CNC.

Distribution and Exhibition

After an excellent year in 2007, admissions and box office slipped back in 2008. First estimates put atttendance down an estimated 4.1% to 111.6 million while box office shrank by 3.8% to EUR 644.5 million. 2007 has seen an exception national market share of 32% - 2008 was only slightly below that figure at 29.3%. Six local films figured in the Top 20 chart, which was led by the usual end-of-year comedy, *Natale a Rio*. Cannes Grand Prix winner *Gomorra* figured at number 10.

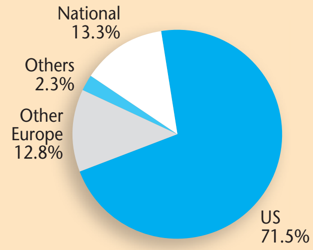
An estimated 57 digital screens were available in Italy at the end of June 2008, in relation to a screen base of around 3 400 screens. Early 2009 saw rapid advances, with 3D as the driving force. *Journey to the Centre of the Earth* opened on just 42 3D screens in January. By April, when *Monsters vs Aliens* was released, a total of 102 3D screens covering most of the territory were ready to welcome the film.

Sources: ANICA, DG Cinema, *Giornale dello Spettacolo, Variety*

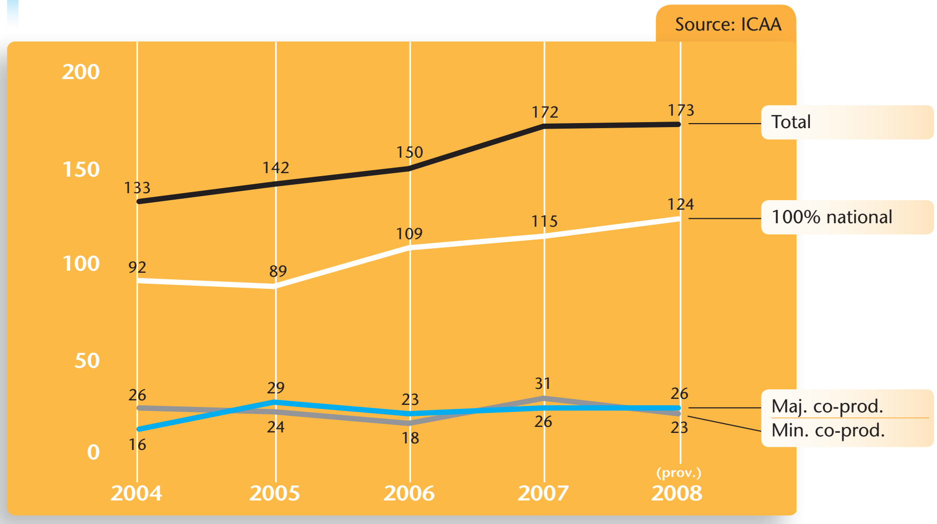
Spain

Population 2008 [e]	45.5 million
GDP per capita 2008 [e]	36 970 USD
Average USD/EUR exchange rate 2008	1 USD = 0.68 EUR
Admissions 2008 [e]	107.8 million
Average admissions per capita 2008 [e]	2.37
Average ticket price 2008 [e]	5.74 EUR (8.41 USD)
Screens 2007 | 2008	4 296 | 4 140
Screens in multiplexes 2007 | 2008	2 663 | ~
Digital screens 2007 | June 2008	33 | 39
Film VOD services 2007 | 2008	~ | 11

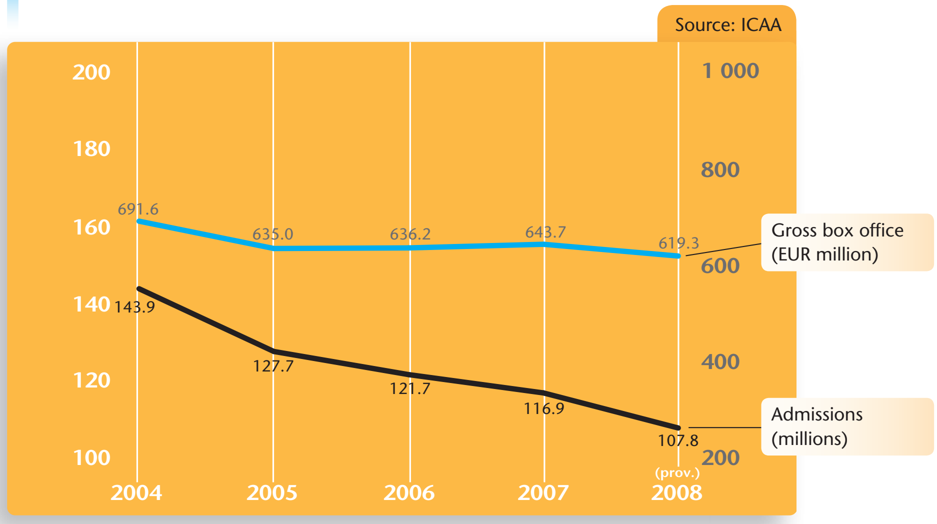
Market shares 2008 [e]



Number of feature films produced | 2004-2008



Admissions and gross box office | 2004-2008



Top 20 films by admissions in Spain | 2008

	Original title	Country of origin	Director	Distributor	Admissions
1	Indiana Jones and the Kingdom…	US	Steven Spielberg	UPI	3 555 840
2	Hancock	US	Peter Berg	Sony Pictures Rel.	2 845 842
3	Kung Fu Panda	US	Osborne, Stevenson	UPI	2 467 971
4	Mamma Mia!	US/GB inc	Phyllida Lloyd	UPI	2 352 795
5	Madagascar: Escape 2 Africa	US	Darnell, McGrath	Piramide Films	2 210 667
6	The Mummy: Tomb of the Dragon…	US/DE	Rob Cohen	UPI	2 157 136
7	The Dark Knight	US/GB inc	Christopher Nolan	Warner Bros.	1 926 310
8	WALL·E	US	Andrew Stanton	Walt Disney	1 920 732
9	The Boy in the Striped Pyjamas	GB inc/US	Mark Herman	Walt Disney	1 812 479
10	The Chronicles of Narnia: Prince…	GB inc/US	Andrew Adamson	Walt Disney	1 727 171
11	Twilight	US	Catherine Hardwicke	Aurum Prod.	1 705 095
12	High School Musical 3: Senior Year	US	Kenny Ortega	Walt Disney	1 498 300
13	Quantum of Solace	GB inc/US	Marc Forster	Sony Pictures Rel.	1 485 437
14	10,000 BC	US/GB inc	Roland Emmerich	Warner Bros.	1 442 754
15	The Oxford Murders	ES/GB/FR/RU	Álex de la Iglesia	Warner Bros.	1 421 063
16	Misión: Salvar la Tierra	ES	Miguel Bardem	Zeta Audiovisual	1 363 275
17	What Happens in Vegas	US	Tom Vaughan	Hispano Foxfilms	1 333 699
18	Iron Man	US	Jon Favreau	Sony Pictures Rel.	1 309 473
19	Horton Hears a Who!	US	Hayward, Martino	Hispano Foxfilms	1 276 501
20	No Country for Old Men	US	Joel Coen, Ethan Coen	UPI	1 268 248

Source: Cinetel

Production and Finance

Production levels remained high for the second year in succession in Spain. 173 feature films were produced in 2008, just one film more than the total for 2007, and the highest figure of the last 26 years. The total number of coproductions fell back from 57 to 49, as there were only 23 minority co-productions in 2008, compared to 31 in 2007. The number of majority and parity co-productions remained stable. Growing production numbers are attributed to the increase in the amount of public funding available and to higher levels of participation in production by broadcasters, who are required to invest 5% of their turnover in local films. Argentina (16 co-productions in 2008) and France (9) remained the preferred co-production partners. 2 co-productions involved Brazil and signpost a new interest in co-operation. The 1963 co-production treaty with Brazil was updated and new co-production treaties were signed with Ireland and New Zealand.

A new initiative to ease difficulties faced by production companies in accessing credit was announced by the Minister of Culture in April 2009. The Ministry will exceptionally cover the legal and administrative costs of companies taking out loans during 2009 with the mutual guarantee fund Audiovisual Aval S.G.R.

Distribution and Exhibition

Admissions fell for the fourth successive year in Spain, with a total of 107.8 million tickets sold, down 7.8% on 2007. Rising average ticket prices limited the fall in box office returns to -3.8%, for an annual total of EUR 619.3 million. National films represented just over 13% of box office, a result very similar to that of 2007 (13.5%). *Indiana Jones* topped the charts, with only two Spanish productions making it into the Top 20. Álex de la Iglesia's English-language international co-production, *The Oxford Murders*, was best placed at number 15 in the chart.

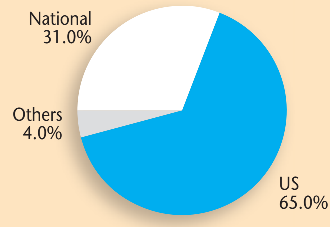
In June 2008 Spain boasted just 39 digital screens for a screen base of 4 140. Early 2009 saw a number of announcements of new screens, all with 3D capability, in order to accommodate the arrival of *Monsters vs Aliens*. These included 32 screens in 3D installed by the Cinesa circuit during the first quarter 2009 and 11 screens installed by the Catalan circuit ACEC, bringing to 15 the total of 3D screens for this circuit.

Sources: ICAA, Cine por la Red, *Screen International*, *Variety*

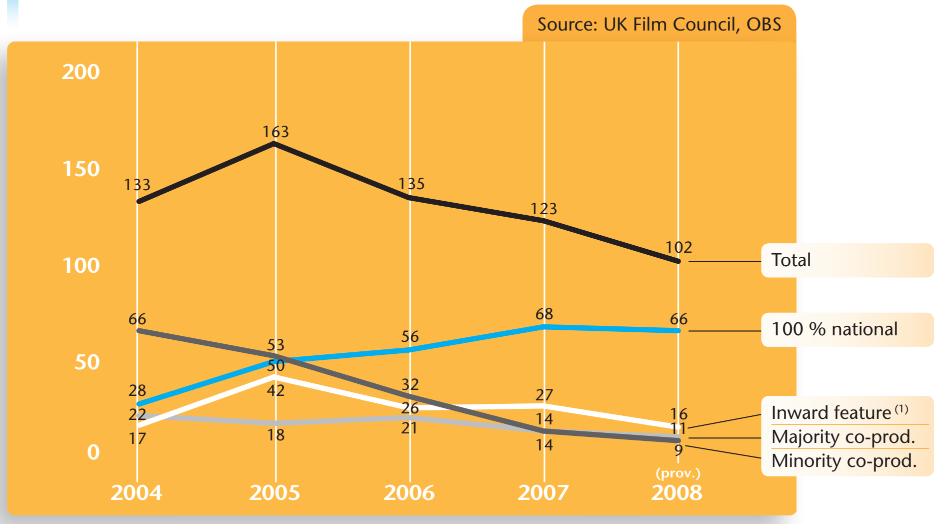
United Kingdom

Population 2008 [e]	61.0 million
GDP per capita 2008 [e]	45 681 USD
Average USD/GBP exchange rate 2008	1 USD = 0.54 GBP
Admissions 2008 [e]	164.2 million
Average admissions per capita 2008 [e]	2.69
Average ticket price 2008	5.18 GBP (9.51 USD)
Screens 2007 I 2008	3 596 I 3 661
Screens in multiplexes 2007 I 2008	2 262 I ~
Digital screens 2007 I June 2008	284 I 298
Film VOD services 2007 I 2008	~ I 20

Market shares 2008 [e]

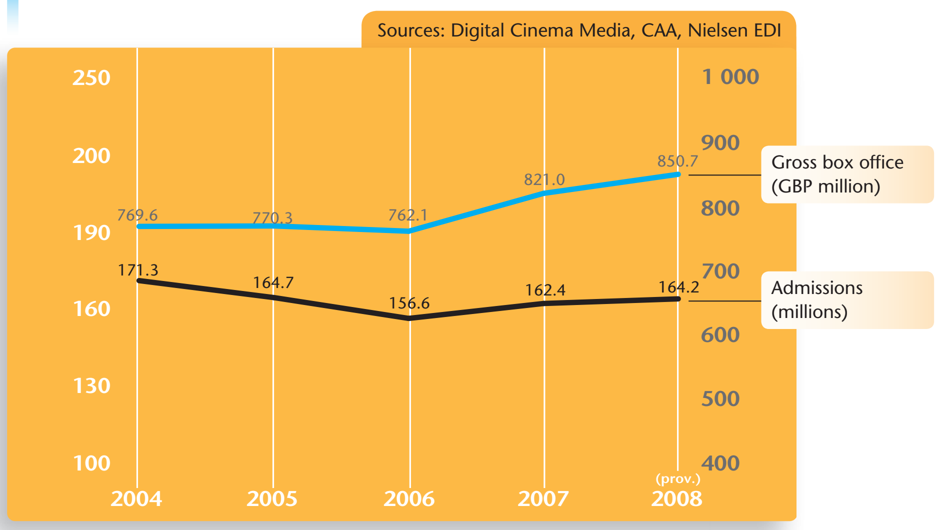


Number of films produced in the United Kingdom I 2004-2008



(1) Excluding inward features involving only VFX work in the UK.

Admissions and gross box office I 2004-2008



Top 20 films by admissions in the United Kingdom & Ireland | 2008 e

Estimated admissions based on average ticket price of GBP 5.18.

	Original title	Country of origin	Director	Distributor	Admissions
1	Mamma Mia!	US/GB Inc	Phyllida Lloyd	Universal Pictures	13 352 688
2	Quantum of Solace	GB/US	Marc Forster	Sony Pictures Rel.	9 859 204
3	The Dark Knight	US/GB Inc	Christopher Nolan	Warner Bros.	9 425 558
4	Indiana Jones and the Kingdom…	US	Steven Spielberg	Paramount	7 774 525
5	Sex and the City	US	Michael Patrick King	Entertainment	5 101 800
6	Hancock	US	Peter Berg	Sony Pictures Int	4 775 691
7	Madagascar: Escape 2 Africa	US	E. Darnell, T. McGrath	Paramount	4 448 768
8	WALL·E	US	Andrew Stanton	Walt Disney	4 422 608
9	HIGH SCHOOL MUSICAL 3	US	Kenny Ortega	Walt Disney	4 395 291
10	Kung Fu Panda	US	Osborne, Stevenson	Paramount	3 900 465
11	Iron Man	US	Jon Favreau	Paramount	3 362 545
12	The Chronicles of Narnia: Prince…	GB inc/US	Andrew Adamson	Walt Disney	2 276 732
13	The Mummy: Tomb of the Dragon…	US/DE	Rob Cohen	Universal Pictures	2 204 952
14	Twilight	US	Catherine Hardwicke	E1 Films	2 142 765
15	Sweeney Todd: The Demon Barber…	GB inc/US	Tim Burton	Warner Bros.	2 117 322
16	The Spiderwick Chronicles	US	Mark Waters	Paramount	2 071 228
17	Step Up 2: The Streets	US	Jon Chu	Universal Pictures	2 035 107
18	Yes Man	US/AU	Peyton Reed	Warner Bros.	2 008 239
19	Four Christmases	US/DE	Seth Gordon	Entertainment	1 979 495
20	Wanted	US/DE/RU	Timur Bekmambetov	Universal Pictures	1 881 084

Sources: UK Film Council, Nielsen EDI

Production and Finance

Both the overall value of production spend in the UK and the number of films made fell back in 2008. Total production spend was down 23% to GBP 578 million, and the total number of films shot was 102, down 21 from 2007. The number of entirely national films remained stable at 66 (68 in 2007) and spending on this type of production rose strongly (+21.5%). The UK was involved in a total of 20 co-productions, down 8 films from 2007, and spending fell sharply, from GBP 72 million in 2007 to GBP 48 million (-34%). Inward investment films were also hit, with numbers falling from 27 films in 2007 to 16 in 2008. An unfavourable exchange rate, the US writers' strike and actors dispute together with more attractive US tax incentives contributed to the downturn.

The outlook for independent production finance in the UK in 2009 appears gloomy. Among the causes for concern is the troubled financial situation of broadcaster Channel 4, whose Film4 arm has been an active funder of independent cinema. Public funder, the UK Film Council, has also had to plan for a GBP 22 million drop in its Lottery funding over the next five years, as the 2012 London Olympics draws away Lottery finance.

Distribution and Exhibition

UK box office rose to GBP 850.7 million in 2008, up 3.6% on 2007 (GBP 821 million). Admissions rose at a slower pace, up by 1.1% to 164.2 million from 162.4 million in 2008. Estimated national market share was 31%, the second highest score of the decade. Three films with UK involvement topped the charts, led by *Mamma Mia*, which with earnings of GBP 69 million, became the most successful film in the UK ever. Its distributor UPI earned a market share of 18.5%, climbing to first place ahead of nearest rival Paramount Pictures International with 16.9%.

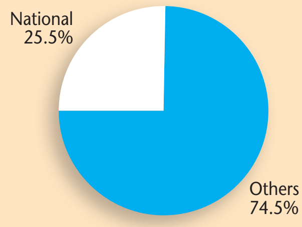
Industry calls for government action on copyright theft were highlighted in early 2009, with the publication of a new report from Oxford Economics, underlining the estimated GBP 268 million gains to the audiovisual industry which could result from a series of legislative changes tackling copyright theft. New approaches to the question, including legislation and the creation of a Rights Agency, are also evoked in 'Digital Britain', a Government plan for digital transition in the UK currently under discussion.

Sources: UK Film Council, Digital Cinema Media, *Screen International*, Department for Culture, Media and Sport.

Russian Federation

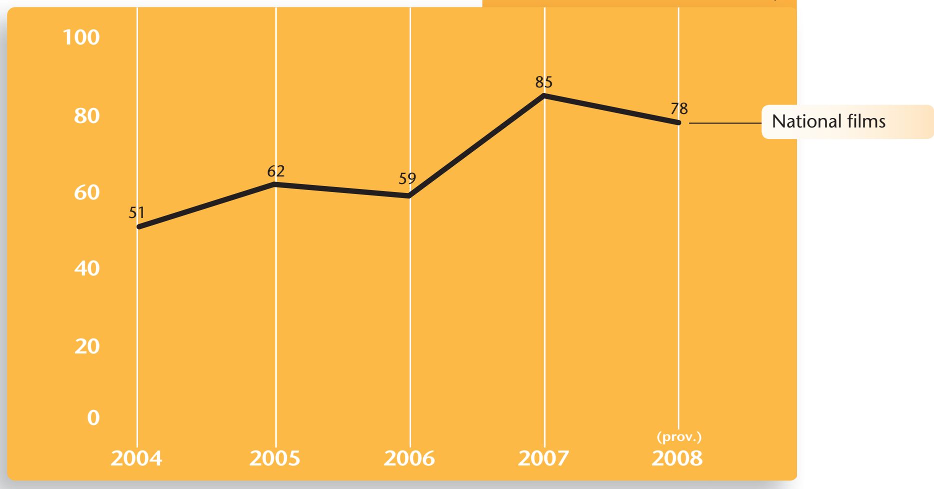
Population 2008 e	141.4 million
GDP per capita 2008 e	12 579 USD
Average USD/RUB exchange rate 2008	1 USD = 24.9 RUB
Admissions 2008	123.9 million
Average admissions per capita 2008	0.88
Average ticket price 2008	166.6 RUB (6.7 USD)
Screens 2007 I 2008 e	1 532 I 1 890
Screens in multiplexes 2007 I 2008 e	277 I ~
Digital screens 2007 I June 2008	31 I 48
Film VOD services 2007 I 2008	~ I 11

Market shares 2008



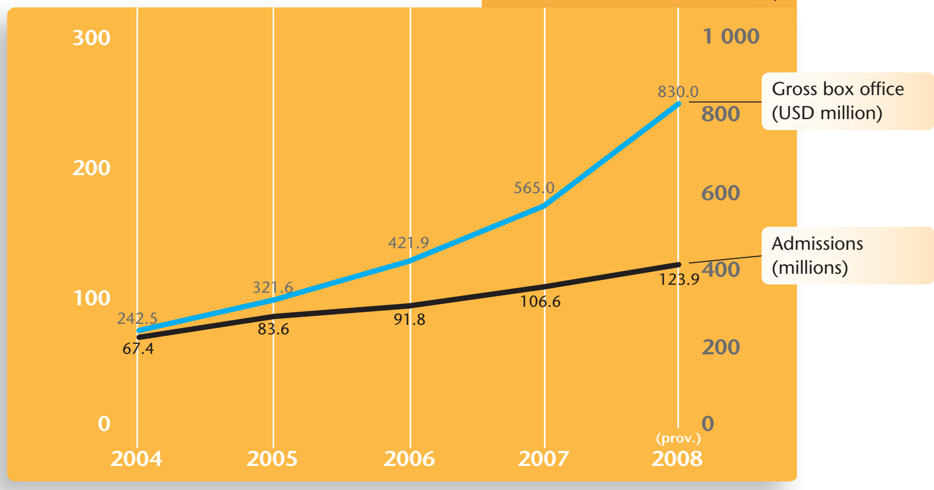
Number of Russian films on first release I 2004-2008

Source: *Russian Film Business Today*



Admissions and gross box office I 2004-2008

Source: *Russian Film Business Today*



Top 20 films by admissions in Russian Federation & CIS (1) | 2008

Estimated admissions based on average ticket price of 6.7 USD.

	Original title	Country of origin	Director	Distributor	Admissions
1	Ironiya sudby. Prodolzhenie	RU	Timur Bekmambetov	20th Century Fox	7 451 217
2	Madagascar: Escape 2 Africa (2)	US	E. Darnell, T. McGrath	UPI	6 086 543
3	Admiral	RU	Andrei Kravchuk	20th Century Fox	5 030 300
4	The Mummy: Tomb of the Dragon…	US/DE	Rob Cohen	UPI	4 148 132
5	Samyy luchshiy film	RU	Kirill Kuzin	Caroprokat	4 117 980
6	Wanted	US/DE	Timur Bekmambetov	UPI	3 925 768
7	Hancock	US	Peter Berg	BVSPR	3 878 481
8	Kung Fu Panda	US	Osborne, Stevenson	UPI	3 116 547
9	Quantum of Solace	GB inc/US	Marc Forster	BVSPR	2 703 107
10	Indiana Jones and the Kingdom…	US	Steven Spielberg	UPI	2 543 958
11	The Chronicles of Narnia: Prince…	GB inc/US	Andrew Adamson	BVSPR	2 214 347
12	National Treasure: Book of Secrets	US	Jon Turteltaub	BVSPR	2 035 256
13	WALL·E	US	Andrew Stanton	BVSPR	1 746 051
14	Bolt (2)	US	B. Howard, C. Williams	BVSPR	1 720 989
15	Ilya Muromets i Solovey Razboynik	RU	Vladimir Toropchin	Nashe Kino	1 453 861
16	Gitler kaput!	RU/UA	Marius Balchunas	Central Partnership	1 449 906
17	Iron Man	US	Jon Favreau	UPI	1 416 723
18	Mamma Mia! (2)	US/GB inc	Phyllida Lloyd	UPI	1 391 169
19	Transporter 3 (2)	FR	Olivier Megaton	Central Partnership	1 386 094
20	I Am Legend	US	Francis Lawrence	Caro Premier	1 376 839

(1) Excluding Ukraine. (2) Still on release after November 2008. Sources: *Russian Film Business Today*, OBS

Production and Funding

Spurred on by public funding Russian production activity had surged in recent years, reaching a record high of 85 films released in 2007. This figure decreased to 78 Russian film releases in 2008 prefiguring the fact that the current financial crisis will pose significant challenges to the Russian film industry in 2009. Several projects have come to a halt since the credit crunch hit Russia in October 2008, drying up funds from banks, and private investors as well as impacting government funding. In May 2008 the Federal Agency for Cinematography and Culture was closed down and its functions taken over by the Filmmaking Department of the Russian Federation Ministry of Culture. In April 2009 a temporary freeze on film grants until 2010 was announced with only previously agreed grants to be paid from the State's annual USD 140 million film fund. A Ministry of Culture official remarked in an interview that the Ministry was not aiming to increase the quantity of local productions but to focus on increasing their competitiveness, with a vast majority of national films failing to recoup their budgets. In response to the increasing scarcity of funds several leading production companies are seeking to reduce production costs by cutting salaries for crews and actors.

Distribution and Exhibition

Despite early signs of the financial crisis cinema attendance in the Russian Federation and CIS continued its impressive growth trend, reaching a record high of 124 million admission, up 16.2% from 2007. Driven by a rise in average ticket price, climbing from USD 5.3 to USD 6.7 gross box office revenues jumped to USD 830 million in 2008, up 47% from USD 565 million in 2007. Box office was dominated by US and by local productions, which took a market share of 25.5%. The 78 Russian films released in 2008 grossed a total of USD 212 million, compared to USD 149 million in 2007. However, there was a high concentration around the top five national films which accounted for 62% of total box office to all Russian films. Three Russian films made it into the top 5, chart-topping *Irony of Fate – The Sequel*, *Admiral* and *The Very Best Film*. With a market share of 24.5% UPI became the top distributor in 2008, followed by 20th Century Fox (18.7%), Caro Premier/Caroprokat (15.2%) and BVSPR (14.6%). 2008 saw the installation of 358 new screens bringing the total screen base to an estimated 1 890. Digital screens increased from 31 in 2007 to 48 by mid-2008.

Sources: *Russian Film Business Today*, *Screen International*, Screen Digest, OBS

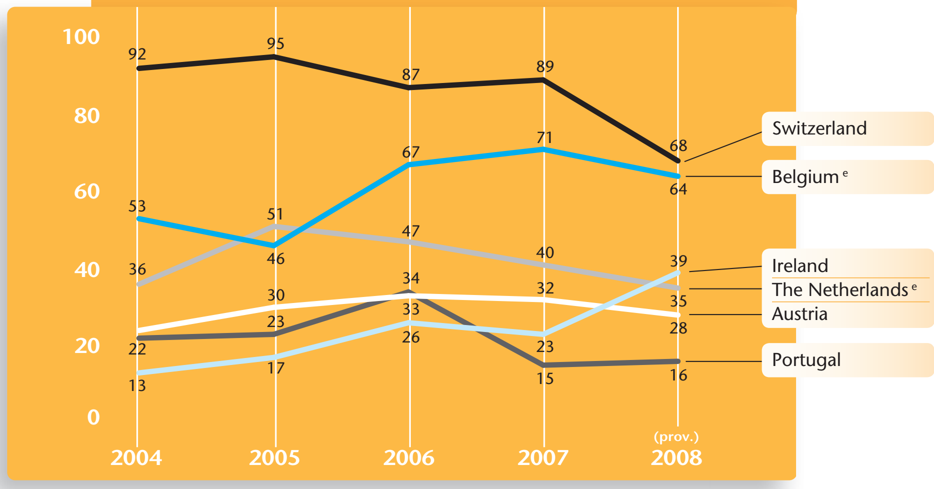
Other Western Europe

	Austria	Belgium	Ireland	Netherlands	Portugal	Switzerland
Population 2008 e (millions)	8.3	10.7	4.4	16.7	10.6	7.3
GDP per capita 2008 e	52 159	49 430	64 660	54 445	24 031	67 379
Admissions 2008 e (milions)	15.6	21.8	18.2	23.5	16.0	14.3
Average admissions per capita 2008	1.89	2.03	4.13	1.41	1.50	1.96
Average ticket price 2008 e (USD)	9.77	7.81 (1)	10.11	10.26	6.40	13.45
Screens 2008	577	513 (1)	435	630 (1)	572	564
Screens in Multiplexes 2007	240	312	206	56	190	103
Digital screens 2007 | June 2008	35 | 38	76 | 77	36 | 39	34 | 36	14 | 26	16 | 23
Film VOD services 2008	9	14	6	28	3	9
National market shares 2008	6.0%	10.0%	0.9%	17.9%	2.5%	3.0%

(1) 2007

Number of feature films produced in selected Western European countries | 2004-2008

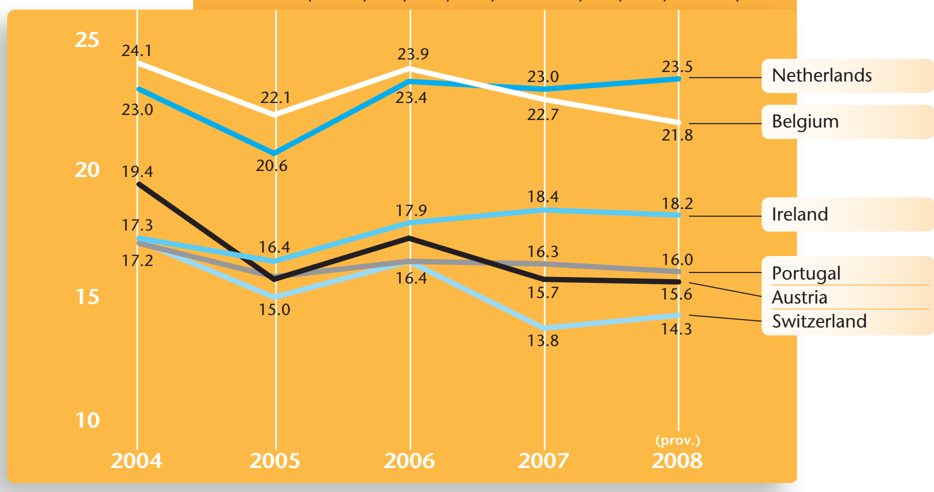
Sources: OFI, MFB, VAF, Centre du Cinéma et de l'Audiovisuel, NFF, ICA, OFS, OBS



Cinema attendance in selected Western European countries | 2004-2008

In millions.

Sources: OFI, FAFO, INS, FCB, CSA, NVF-NVB, ICA, OFS, STATEC, OBS



Top 10 films by admissions in Austria | 2008

	Original title	Country of origin	Director	Distributor	Admissions
1	Mamma Mia!	US/GB inc	Phyllida Lloyd	Universal Pictures	741 268
2	Madagascar: Escape 2 Africa	US	Darnell, McGrath	Universal Pictures	640 015
3	Quantum of Solace	GB inc/US	Marc Forster	Sony Pictures	498 829
4	Kung Fu Panda	US	Osborne, Stevenson	Universal Pictures	461 454
5	Hancock	US	Peter Berg	Sony Pictures	442 287
6	The Dark Knight	US/GB inc	Christopher Nolan	Warner Bros	440 927
7	Indiana Jones and the Kingdom…	US	Steven Spielberg	Universal Pictures	319 050
8	Sex and the City	US	Michael Patrick King	Warner Bros	302 155
9	I Am Legend	US	Francis Lawrence	Warner Bros	297 366
10	WALL·E	US	Andrew Stanton	Walt Disney	295 655

Sources: OFI, Nielsen EDI

Top 10 films by admissions in Belgium | 2008

	Original title	Country of origin	Director	Distributor	Admissions
1	Bienvenue chez les Ch'tis	FR	Dany Boon	Alternative Films	1 096 179
2	Loft	BE	Erik Van Looy	Independent Films	912 833
3	Kung Fu Panda	US	Osborne, Stevenson	UPI	620 000
4	Madagascar: Escape 2 Africa	US	Darnell, McGrath	UPI	617 000
5	Astérix aux jeux olympiques	FR/DE/ES/IT	Forestier, Langmann	Alternative Films	604 065
6	The Dark Knight	US/GB inc	Christopher Nolan	Warner Bros	602 370
7	Indiana Jones and the Kingdom…	US	Steven Spielberg	UPI	564 000
8	WALL·E	US	Andrew Stanton	Walt Disney	495 706
9	Mamma Mia!	US/GB inc	Phyllida Lloyd	UPI	460 000
10	Hancock	US	Peter Berg	Sony Pictures	416 297

Source: *Moniteur du Film en Belgique*

Top 10 films by admissions in the Netherlands | 2008

	Original title	Country of origin	Director	Distributor	Admissions
1	Mamma Mia!	US/GB inc	Phyllida Lloyd	Universal Pictures	985 620
2	Quantum of Solace	GB inc/US	Marc Forster	Sony Pictures	855 019
3	Madagascar: Escape 2 Africa	US	Darnell, McGrath	Universal Pictures	719 970
4	Kung Fu Panda	US	Osborne, Stevenson	Universal Pictures	648 012
5	The Kite Runner	US	Marc Forster	Universal Pictures	634 619
6	The Dark Knight	US/GB inc	Christopher Nolan	Warner Bros	597 775
7	Indiana Jones and the Kingdom…	US	Steven Spielberg	Universal Pictures	579 322
8	Anubis: Het pad der 7 zonden	BE/NL	Dennis Bots	Independent Films	554 593
9	WALL·E	US	Andrew Stanton	Walt Disney	531 850
10	Sex and the City	US	Michael Patrick King	Paradiso Entertain.	493 001

Sources: MaccsBox, NVB & NVF

Top 10 films by admissions in Portugal | 2008

	Original title	Country of origin	Director	Distributor	Admissions
1	Mamma Mia!	US/GB inc	Phyllida Lloyd	Lusomundo Audiov.	851 181
2	Madagascar: Escape 2 Africa	US	Darnell, McGrath	Lusomundo Audiov.	731 427
3	Kung Fu Panda	US	Osborne, Stevenson	Lusomundo Audiov.	605 062
4	Indiana Jones and the Kingdom…	US	Steven Spielberg	Lusomundo Audiov.	573 017
5	Astérix aux jeux olympiques	FR/DE/ES/IT	Forestier, Langmann	Lusomundo Audiov.	438 014
6	Quantum of Solace	GB inc/US	Marc Forster	Columbia Tristar	403 446
7	WALL·E	US	Andrew Stanton	Lusomundo Audiov.	352 086
8	The Dark Knight	US/GB inc	Christopher Nolan	Columbia Tristar	334 330
9	The Mummy: Tomb of the…	US/DE	Rob Cohen	Lusomundo Audiov.	279 680
10	Wanted	US/DE/RU	Timur Bekmambetov	Lusomundo Audiov.	262 176

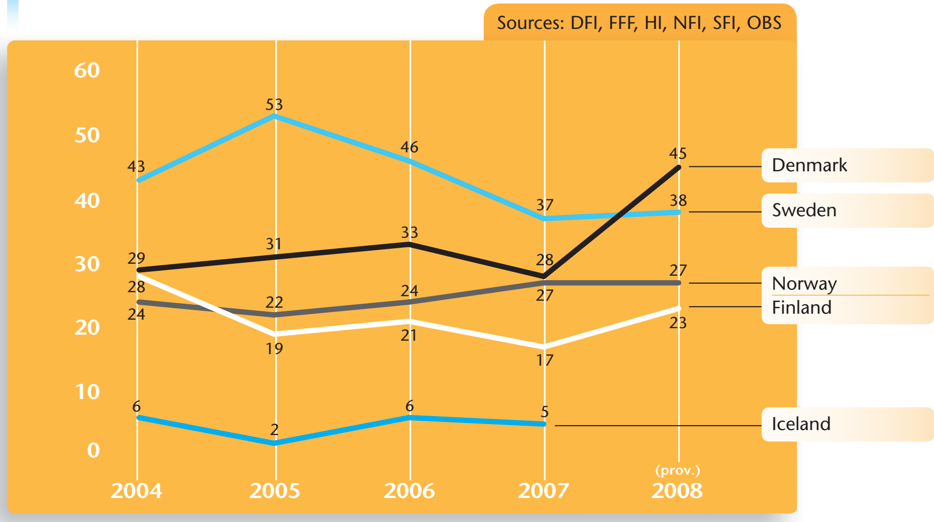
Source: ICA

Nordic countries

	Denmark	Finland	Iceland	Norway	Sweden
Population 2008 e (millions)	5.5	5.3	0.3	4.7	9.2
GDP per capita 2008 e	67 387	54 578	60 122	102 525	55 624
Admissions 2008 e (milions)	13.2	6.9	1.5	11.9	15.3
Average admissions per capita 2008	2.41	1.30	4.75	2.53	1.65
Average ticket price 2008 e (USD)	13.50	11.62	9.78	13.66	12.50
Screens 2008	397	324	43 (1)	428	848
Screens in Multiplexes 2007	74	51	~	56	174
Digital screens 2007 | June 2008	6 | 10	1 | 6	3 | 3	35 | 38	5 | 7
Film VOD services 2008	14	11	1	15	19
National market shares 2008	33.0%	23.2%	10.5%	22.4%	20.2%

(1) 2007

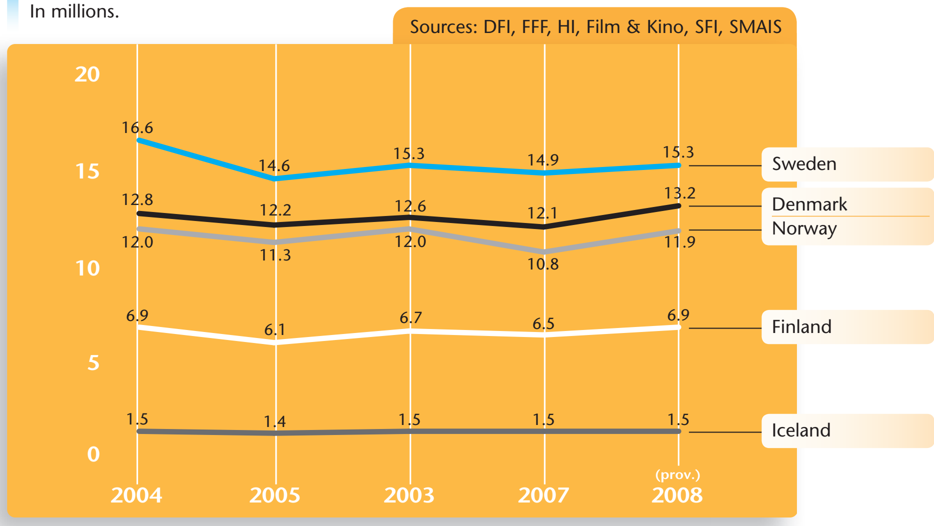
Number of feature films produced in the Nordic countries | 2004-2008



Note: Danish figures refer to number of feature films receiving public funding in a given year.

Cinema attendance in Nordic countries | 2004-2008

In millions.



Top 10 films by admissions in Denmark | 2008

	Original title	Country of origin	Director	Distributor	Admissions
1	Flammen & Citronen	DK/CZ/DE	Ole Christian Madsen	S. Metronome	673 312
2	Indiana Jones and the Kingdom…	US	Steven Spielberg	UIP	528 715
3	Quantum of Solace	GB inc/US	Marc Forster	Buena Vista	458 077
4	Mamma Mia!	US/GB inc	Phyllida Lloyd	UIP	448 112
5	The Dark Knight	US/GB inc	Christopher Nolan	S. Metronome	437 411
6	Blå mænd	DK	Rasmus Heide	Scanbox Entert.	437 318
7	Sex and the City	US	Michael P. King	SF-Film	398 559
8	Rejsen til Saturn	DK	Andersen, Christoffersen	Nordisk Film Biog.	391 371
9	Far Til Fire - På Hjemmebane	DK	Claus Bjerre	Scanbox Entert.	374 974
10	Kung Fu Panda	US	Osborne, Stevenson	UIP	361 606

Sources: Danmarks Statistics, DFI

Top 10 films by admissions in Finland | 2008

	Original title	Country of origin	Director	Distributor	Admissions
1	Quantum of Solace	GB inc/US	Marc Forster	Walt Disney	434 446
2	Mamma Mia!	US/GB inc	Phyllida Lloyd	Finnkino	398 910
3	Sex and the City	US	Michael Patrick King	FS Film	375 373
4	The Dark Knight	US/GB inc	Christopher Nolan	S. Metronome	296 125
5	Indiana Jones and the Kingdom…	US	Steven Spielberg	Finnkino	255 661
6	Risto Räppääjä	FI	Mari Rantasila	Nordisk Film	213 027
7	Niko - lentäjän poika	FI/DE/DK/IE	Hegner, Juusonen	Nordisk Film	196 087
8	Madagascar: Escape 2 Africa	US	Darnell, McGrath	Finnkino	186 968
9	Kummeli alivuokralainen	FI	Matti Grönberg	Nordisk Film	183 444
10	Kung Fu Panda	US	Osborne, Stevenson	Finnkino	173 213

Source: FFF

Top 10 films by admissions in Norway | 2008

	Original title	Country of origin	Director	Distributor	Admissions
1	Mamma Mia!	US/GB inc	Phyllida Lloyd	UIP	1 109 756
2	Quantum of Solace	GB inc/US	Marc Forster	Walt Disney Norway	473 387
3	The Dark Knight	US/GB inc	Christopher Nolan	S. Metronome	410 959
4	Max Manus	NO/DK/DE	Roenning, Sandberg	Nordisk Filmdistr.	403 552
5	Kautokeino-opprøret	DK/NO/SE	Nils Gaup	S. Metronome	343 784
6	Indiana Jones and the Kingdom…	US	Steven Spielberg	UIP	331 767
7	Sex and the City	US	Michael Patrick King	SF Norway	309 140
8	Kung Fu Panda	US	Osborne, Stevenson	UIP	302 301
9	WALL·E	US	Andrew Stanton	Walt Disney Norway	295 126
10	Lange flate ballær II - I kongens…	NO	Harald Zwart	SF Norway	293 057

Source: *Film og Kino*

Top 10 films by admissions in Sweden | 2008

	Original title	Country of origin	Director	Distributor	Admissions
1	Mamma Mia!	US/GB inc	Phyllida Lloyd	UIP/Universal	1 890 307
2	Quantum of Solace	GB inc/US	Marc Forster	Sony Pictures	677 674
3	Arn: Tempelriddaren	SE/DK/FI (1)	Peter Flinth	SF, Sonet Film, …	553 494
4	The Dark Knight	US/GB inc	Christopher Nolan	Sandrew, Warner	536 490
5	Arn - Riket vid vägens slut	DK/SE/FI	Peter Flinth	SF, Sonet Film, …	520 745
6	Sex and the City	US	Michael Patrick King	SF, Sonet Film, …	512 624
7	Indiana Jones and the Kingdom…	US	Steven Spielberg	UIP/Paramount	432 767
8	WALL·E	US	Andrew Stanton	Buena Vista	357 173
9	Kung Fu Panda	US	Osborne, Stevenson	UIP/Paramount	335 880
10	The Chronicles of Narnia…	GB inc/US	Andrew Adamson	Buena Vista	327 058

(1) also including NO/DE/GB.

Source: SFI

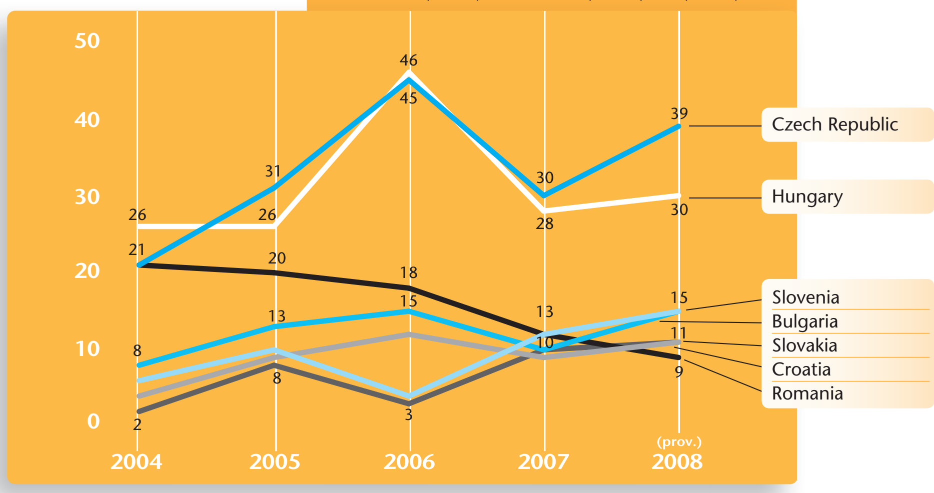
Central and South-Eastern Europe

	Bulgaria	Croatia	Czech Republic	Hungary	Romania	Slovakia	Slovenia
Population 2008 e (millions)	7.6	4.4	10.3	10.1	21.5	5.4	2.0
GDP per capita 2008 e (USD)	6 849	14 414	21 041	16 343	9 953	18 585	28 328
Admissions 2008 e (milions)	2.8	2.3	12.9	10.4	3.8	3.4	2.4
Average admissions per capita 2008	0.37	0.51	1.25	1.03	0.18	0.62	1.20
Average ticket price 2008 e (USD)	5.00	5.23	5.54	5.58	5.53	5.11	5.81
Screens 2008	117	123 (1)	689	416	136	251 (1)	110
Screens in multiplexes 2007	43	30	130	124	21	20	38
Digital screens 2007 | June 2008	4 | 6	~ | 1	1 | 1	2 | 6	~ | 4	~ | ~	2 | 2
Film VOD services 2008	~	~	2	5	~	1	1
National market shares 2008	2.4%	1.6%	39.6%	11.4%	3.6%	15.6%	4.3%

(1) 2007

Number of feature films produced in Central and South-Eastern Europe | 2004-2008

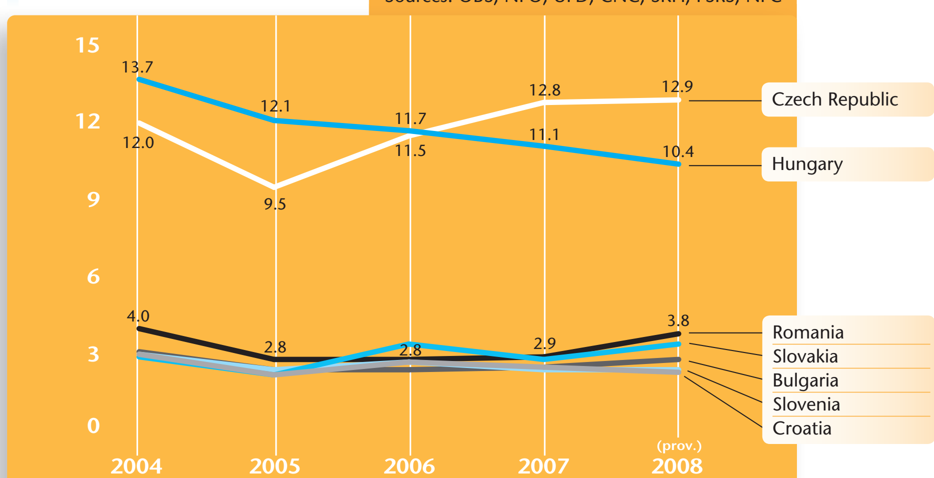
Sources: OBS, NFO, Min.Cult CZ, CNC, SKFI, FSRS, NFC



Cinema attendance in Central and South-Eastern Europe | 2004-2008

In millions.

Sources: OBS, NFO, UFD, CNC, SKFI, FSRS, NFC



Top 10 films by admissions in the Czech Republic | 2008

	Original title	Country of origin	Director	Distributor	Admissions
1	Bathory	CZ/SK/GB/HU	Juraj Jakubisko	Bontonfilm	911 855
2	Mamma Mia!	US/GB inc	Phyllida Lloyd	Bontonfilm	715 163
3	Madagascar: Escape 2 Africa	US	Darnell, McGrath	Bontonfilm	588 694
4	Nestyda	CZ	Jan Hrebejk	Falcon	474 624
5	Bobule	CZ	Tomás Barina	Bioscop/Magic Box	350 627
6	Astérix aux jeux olympiques	FR/DE/ES/IT	Forestier, Langmann	SPI	314 348
7	Nejkrasnejsi hadanka	CZ	Zdenek Troska	Falcon	300 478
8	Indiana Jones and the Kingdom…	US	Steven Spielberg	Bontonfilm	274 216
9	Kung Fu Panda	US	Osborne, Stevenson	Bontonfilm	273 888
10	Snezenky a machri po 25 letech	CZ	Viktor Taus	Falcon	264 087

Source: Unie Filmovvych Distributoru

Top 10 films by admissions in Hungary | 2008

	Original title	Country of origin	Director	Distributor	Admissions
1	Mamma Mia!	US/GB inc	Phyllida Lloyd	UIP-Dunafilm	767 550
2	Madagascar: Escape 2 Africa	US	Darnell, McGrath	UIP-Dunafilm	409 900
3	Indiana Jones and the Kingdom…	US	Steven Spielberg	UIP-Dunafilm	288 620
4	Sex and the City	US	Michael Patrick King	Intercom	281 477
5	The Mummy: Tomb of the…	US/DE	Rob Cohen	UIP-Dunafilm	284 256
6	Kung Fu Panda	US	Osborne, Stevenson	UIP-Dunafilm	308 774
7	High School Musical 3: Senior…	US	Kenny Ortega	Fórum-Hungary	235 990
8	The Dark Knight	US/GB inc	Christopher Nolan	Intercom	223 642
9	Quantum of Solace	GB inc/US	Marc Forster	Intercom	181 833
10	WALL·E	US	Andrew Stanton	Fórum-Hungary	207 235

Source: National Film Office

Top 10 films by admissions in Romania | 2008

	Original title	Country of origin	Director	Distributor	Admissions
1	Journey to the Center of the Earth	US	Eric Brevig	Intercomfilm	116 145
2	Hancock	US	Peter Berg	Intercomfilm	90 704
3	The Dark Knight	US/GB inc	Christopher Nolan	Intercomfilm	81 993
4	My Best Friend's Girl	US	Howard Deutch	Media Pro Pictures	80 187
5	Quantum of Solace	GB inc/US	Marc Forster	Intercomfilm	79 647
6	Madagascar: Escape 2 Africa	US	Darnell, McGrath	Ro-Image 2000	79 071
7	Sex and the City	US	Michael Patrick King	Intercomfilm	77 933
8	10,000 BC	US/GB inc	Roland Emmerich	Intercomfilm	72 964
9	The Mummy: Tomb of the…	US/DE	Rob Cohen	Ro-Image 2000	71 775
10	Wanted	US/DE/RU	Timur Bekmambetov	Ro-Image 2000	68 807

Source: Centrul National al Cinematografiei

Top 10 films by admissions in the Slovak Republic | 2008

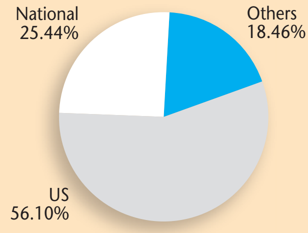
	Original title	Country of origin	Director	Distributor	Admissions
1	Bathory	CZ/SK/GB/HU	Juraj Jakubisko	Tatrafilm	426 901
2	Madagascar: Escape 2 Africa	US	Darnell, McGrath	Tatrafilm	196 560
3	Mamma Mia!	US/GB inc	Phyllida Lloyd	Tatrafilm	120 478
4	Astérix aux jeux olympiques	FR/DE/ES/IT	Forestier, Langmann	SPI International	112 586
5	WALL·E	US	Andrew Stanton	Saturn Entertain.	97 359
6	Kung Fu Panda	US	Osborne, Stevenson	Tatrafilm	89 766
7	Step Up 2: The Streets	US	Jon Chu	SPI International	89 039
8	Gympl	CZ	Tomás Vorel	Continental Film	80 150
9	Sex and the City	US	Michael Patrick King	Continental Film	75 135
10	The Mummy: Tomb of the…	US/DE	Rob Cohen	Tatrafilm	66 131

Source: Slovak Film Institute

Poland

Population 2008 e	38.1 million
GDP per capita 2008 e	14 893 USD
Average USD/PLN exchange rate 2008	1 USD = 2.41 PLN
Admissions 2008 e	33.8 million
Average admissions per capita 2008	0.89
Average ticket price 2008 e	16.21 PLN (6.72 USD)
Screens 2007 I 2008	1 008 I ~
Screens in multiplexes 2007 I 2008	433 I ~
Digital screens 2007 I June 2008	8 I 12
Film VOD services 2007 I 2008	~ I 10

Market shares 2008 e



Top 10 films by admissions in Poland I 2008

	Original title	Country of origin	Director	Distributor	Admissions
1	Lejdis	PL	Tomasz Konecki	ITI Cinema	2 529 122
2	Nie klam, kochanie	PL	Piotr Weresniak	ITI/Interfilm	1 395 471
3	Kung Fu Panda	US	M. Osborne, J. Stevenson	UIP	1 186 724
4	Mamma Mia!	US/GB inc	Phyllida Lloyd	UIP	1 125 240
5	Swiadectwo	PL	Pawel Pitera	Kino Swiat	1 034 911
6	Indiana Jones and the Kingdom…	US	Steven Spielberg	UIP	916 848
7	To nie tak jak myslisz, kotku	PL	Slawomir Krynski	Kino Swiat	830 876
8	The Chronicles of Narnia…	GB inc/US	Andrew Adamson	Forum Film	819 019
9	Quantum of Solace	GB inc/US	Marc Forster	UIP	784 572
10	Bolt	US	B. Howard, C. Williams	Forum Film	744 154

Source: boxoffice.pl

Distribution and Exhibition

Polish cinema attendance increased by 3.4% to 33.8 million tickets sold in 2008, up from 32.6 million in 2007. Gross box office grew by 13.6% to PLN 547 million (USD 227 million). 2008 turned out to be a successful year for Polish films, generating a market share of 25.4% of total admissions, the highest level in recent years and up from just 3.4% in 2005. Two local productions *Ladies* and *Don't Lie*, *Honey* topped the charts in 2008. A total of 5 national films made it into the top 20. US films accounted for 56.1% of admissions, non-national European films for 19.2%. The distribution market was once more dominated by US major UIP (24%) followed by Forum Film (13%), ITI Cinema and Kino Swiat (11% each). Multiplex concentration continued to increase in 2007 with 43% of all Polish screens falling into this category, up from 39% in 2006. These screens accounted for about 66% of total admissions. In 2008 the Polish Filmmakers Association in co-operation with the Polish Film Institute and the Ministry of Culture launched an initiative to support smaller cinemas in their transition to digital projection in order to secure screening outlets for national and European films. The programme plans to support up to 300 cinemas in installing digital projectors. According to figures from the Polish Audiovisual Producers Chamber of Commerce digital screens jumped to 69 throughout 2008.

Production

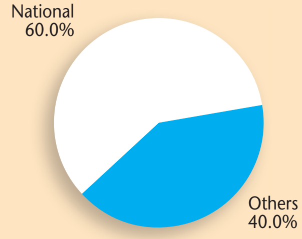
According to figures from the Polish Film Institute production activity continued to increase with 46 feature films being produced in 2008, up from 40 in 2007 and 27 in 2006. The uptake in local film production as well as surging market shares for national films can be largely attributed to the funding schemes developed by the Polish Film Institute which became operational in May 2006 as well as the creation of several regional film funds. The new Cinema Law which came into effect in 2005 seems to have encouraged international co-productions, whose figures jumped from only 4 in 2004 to 16 in 2008. Building new production and post-production facilities and offering competitive pricing, the country is also trying to attract more foreign productions to shoot in Poland.

Sources: PISF, boxoffice.pl, Film New Europe, *Screen International*, OBS

Turkey

Population 2008 e	69.7 million
GDP per capita 2008 e	11 463 USD
Average USD/TRY exchange rate 2008	1 USD = 1.31 TRY
Admissions 2008 e	38.5 million
Average admissions per capita 2008 e	0.55
Average ticket price 2008 e	7.85 TRY (6.01 USD)
Screens 2007 | 2008 e	1 464 | ~
Screens in multiplexes 2007 | 2008	303 | ~
Digital screens 2007 | June 2008	1 | 1
Film VOD services 2007 | 2008	~ | 2

Market shares 2008 e



Top 10 films by admissions in Turkey | 2008

	Original title	Country of origin	Director	Distributor	Admissions
1	Recep Ivedik	TR	Togan Gökbakar	Ozen Film	4 301 641
2	A.R.O.G: Bir Yontmatas Filmi	TR	Cem Yilmaz, Ali Taner Baltaci	UIP	3 457 966
3	Muro: Nalet olsun içimdeki…	TR	Zübeyr Sasmaz	Ozen Film	2 165 199
4	Issiz Adam	TR	Cagan Irmak	Cinefilm	2 012 780
5	Osmanli Cumhuriyeti	TR	Gani Müjde	UIP	1 401 420
6	Mustafa	TR	Dündar, Mehmet Duranoglu	Warner Bros.	1 098 687
7	120	TR	Özhan Eren, Murat Saraçoglu	Ozen Film	1 033 917
8	Maskeli Besler: Kibris	TR	Murat Aslan	UIP	960 979
9	Çilgin dersane kampta	TR	Faruk Aksoy	Ozen Film	899 314
10	O… Çocuklari	TR	Murat Saraçoglu	Dinamik Prodüksiyon	713 546

Source: *Sinema Gazetesi*

Production

Driven by rising demand for local films and improved funding, Turkish film production had been growing significantly over the past years. While there were only 18 national films released five years ago, these increased to 43 in 2007 and 51 in 2008. The success of local films at the box office has helped to attract funding from broadcasters and even private money. According to the Ankara Cinema Association, television channels are getting increasingly interested in buying local films before they are shot. The Turkish government also plans to introduce a tax incentive scheme to attract foreign productions and a bill may be passed by Parliament in 2009.

Distribution and Exhibition

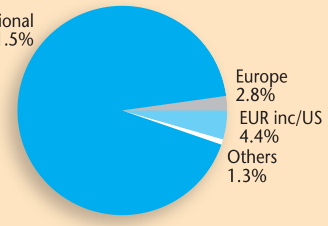
2008 proved to be a year of records for the Turkish cinema industry. Admissions were up an impressive 23.4% from 31.2. million in 2007 to 38.5 million. With average ticket prices remaining fairly stable gross box office revenues increased by 24.9% to TRY 303 million (USD 232 million). National films achieved a record market share of 60%, a long way from the 7.4% share registered in 2002 and well above the previous year's 38%. Released early in the year Togan Gökbakar's much discussed politically incorrect comedy *Recep Ivedik* became the country's most watched film in recent years, selling more than 4.3 million tickets and topping the charts in 2008. Two comedies, *A.R.O.G*, a follow-up to 2004 space comedy G.O.R.A, and *Muro: Damn the Humanist Inside* followed. A documentary about Turkey's revered leader Mustafa Kemal Atatürk became the most controversial film of the year attracting almost 1.1 million viewers and helping Turkish films account for all of the top 10 places in 2008. US films had to take second place, with an estimated 32% of total admissions, down almost 17 percentage points from 2007. European films accounted for 8.1%, compared to about 11% in the previous year. The distribution market in 2008 was clearly dominated by UIP with a market share of 34% of total admissions, followed by Özen Film (28%) and Warner Bros. (14%). On a cumulative basis the three leading distributors took 76% of the total market. There were 1 464 screens in 2007, 163 up from the previous year. Multiplex screens accounted for 21% of the total screen base in 2007. With only 1 digital screen installed by mid-2008 Turkey is one of the countries with the slowest uptake of digital projection in Europe.

Sources: *Sinema Gazetesi, Variety, Hürriyet, Timeturk*, OBS

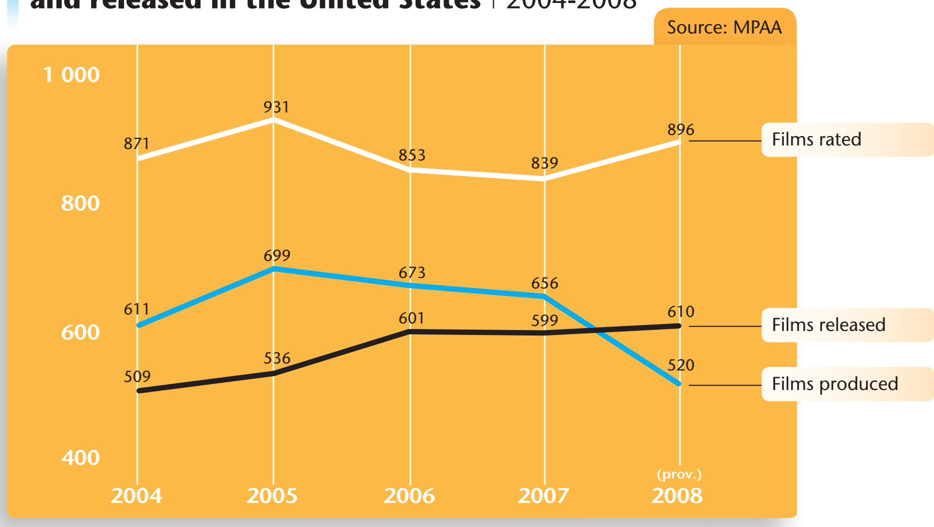
United States

Population 2008 e	304.8 million
GDP per capita 2008 e	47 025 USD
Average USD/EUR exchange rate 2008	1 USD = 0.68 EUR
Admissions 2008 e	1 364 million
Average admissions per capita 2008	4.47
Average ticket price 2008 e	7.18 USD (4.91 EUR)
Indoor screens 2007 I 2008	39 347 I 39 476
Screens in Multiplexes 2007 I 2008 e	29 170 I 29 212
Digital screens 2007 I 2008	4 632 I 5 474

Market shares 2008 e

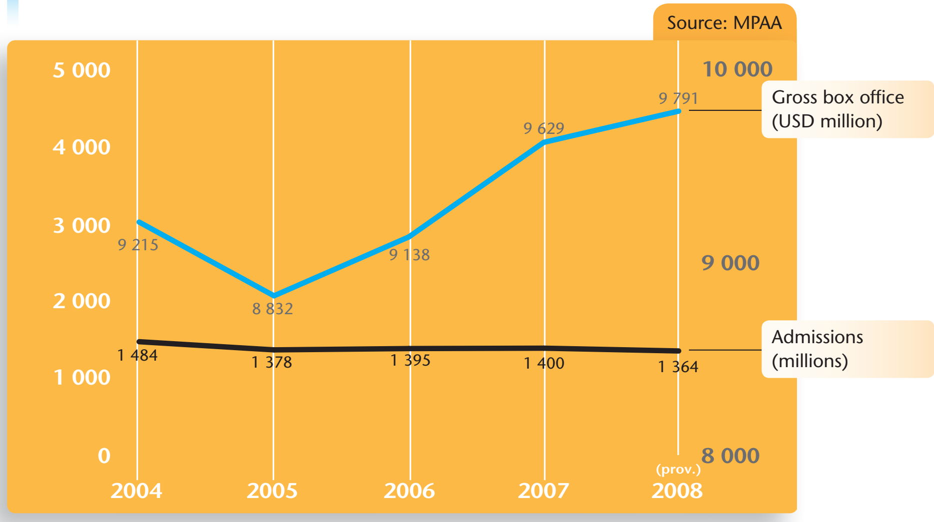


Number of films produced, rated and released in the United States I 2004-2008



Note: Data prior to 2008 updated due to a change of source.

Admissions and gross box office I 2004-2008



Top 20 films by admissions in North America | 2008

Estimated admissions in the United States and Canada based on average ticket price of USD 7.18.

	Original title	Country of origin	Director	Distributor	Admissions [e]
1	The Dark Knight	US/GB inc	Christopher Nolan	Warner Bros.	73 946 579
2	Iron Man	US	Jon Favreau	Paramount Pictures	44 333 315
3	Indiana Jones and the Kingdom…	US	Steven Spielberg	Paramount Pictures	44 153 740
4	Hancock	US	Peter Berg	Sony	31 747 392
5	WALL·E	US	Andrew Stanton	Disney	31 169 880
6	Kung Fu Panda	US	Osborne, Stevenson	Paramount-Dreamwks	30 004 818
7	Madagascar: Escape 2 Africa	US	Darnell, McGrath	Paramount-Dreamwks	24 520 670
8	Twilight	US	Catherine Hardwicke	Summit	23 993 622
9	Quantum of Solace	US/GB inc	Marc Forster	Sony-MGM	23 076 652
10	Horton Hears a Who!	US	Hayward, Martino	Fox	21 522 206
11	Sex and the City	US	Michael Patrick King	Warner Bros.	21 260 064
12	Mamma Mia!	US/GB inc	Phyllida Lloyd	Universal Pictures	20 062 884
13	The Chronicles of Narnia…	GB inc/US	Andrew Adamson	Disney	19 724 442
14	The Incredible Hulk	US	Louis Leterrier	Universal Pictures	18 775 336
15	Wanted	US/DE/RU	Timur Bekmambetov	Universal Pictures	18 733 781
16	Get Smart	US	Peter Segal	Warner Bros.	18 150 308
17	Four Christmases	US/DE	Seth Gordon	Warner Bros.	16 069 421
18	Juno	US/CA/HU	Jason Reitman	Fox Searchlight	15 602 403
19	Tropic Thunder	US/DE	Ben Stiller	Paramount-Dreamwks	15 384 583
20	Bolt	US	Howard, Williams	Disney	14 850 307

Sources: *Variety*, OBS

Production and Finance

According to revised MPAA figures production volume plummeted by 21% from 656 feature films in 2007 to 520 in 2008. The strike by the Writers' Guilds of America in late 2007 and early 2008, as well as the difficult economic environment in the second half of 2008 were the main factors contributing to the significant decline in production activity. Though California recently introduced a 20% tax credit competing with tax incentive schemes in other states like New Mexico, Michigan or Illinois, there is uncertainty over the prolongation of incentive schemes in some less-affluent US states.

Distribution and Exhibition

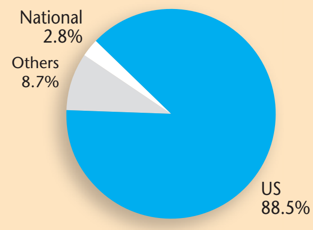
Despite US admissions actually decreasing by 2.6% to 1.364 billion tickets sold, gross box office revenues reached an all-time high, climbing to USD 9.8 billion in 2008, up 1.7% from 2007. Box office growth was driven by an average ticket price rise from USD 6.88 to USD 7.18. 2008 saw the release of 610 films, about 10 films more compared to the two previous years and the largest release slate on record. MPAA members released 162 new films, 26 less than in 2007. Non-MPAA affiliated independents on the other hand released a total of 444 films, 48 more than in 2007. Led by the enormous success of *The Dark Knight*, grossing USD 531 million, *Iron Man* (USD 318 million) and the latest *Indiana Jones* instalment (USD 317 million) US films increased their market share taking about 91.5% of the total box office. European films, including films produced in Europe with incoming investment from the US, accounted for 7.2%, 1.6 percentage points down from 2007. A total of 25 films crossed the USD 100 million benchmark, compared to 28 films in 2007 and 19 in 2006. Warner Bros became the market leading studio in 2008, taking 18.3% of the total box office, followed by Paramount (16.3%) and Sony Pictures (13.2%). International box office increased by 7.1% to a record high of USD 18.3 billion, accounting for 65% of studio's global box office. In 2008 the number of indoor screens increased by 129 to reach 39 476. The past three years saw a clear shift from so called miniplexes (2 to 7 screens), decreasing by 6.2%, to megaplexes (16 or more screens) increasing by the same rate. Multiplex and megaplex screens account for 74% of the total screen base. According to Screen Digest figures 842 new digital screens were installed in the US during 2008 bringing the total from 4 632 to 5 474 digital screens, representing 64% of digital screens worldwide.

Sources: MPAA, Screen Digest, *Variety*, *Screen International*

Canada

Population 2008 e	33.2 million
GDP per capita 2008 e	47 073 USD
Average USD/CAD exchange rate 2008	1 USD = 1.07 CAD
Gross Box Office 2008 (million)	920 CAD (862 USD)
Admissions 2007	104.5 million
Average admissions per capita 2007	3.18
Average ticket price 2007 e	7.77 CAD (7.23 USD)
Screens 2007 I 2008	2 652 I ~
Digital screens 2007 I June 2008	18 I 98

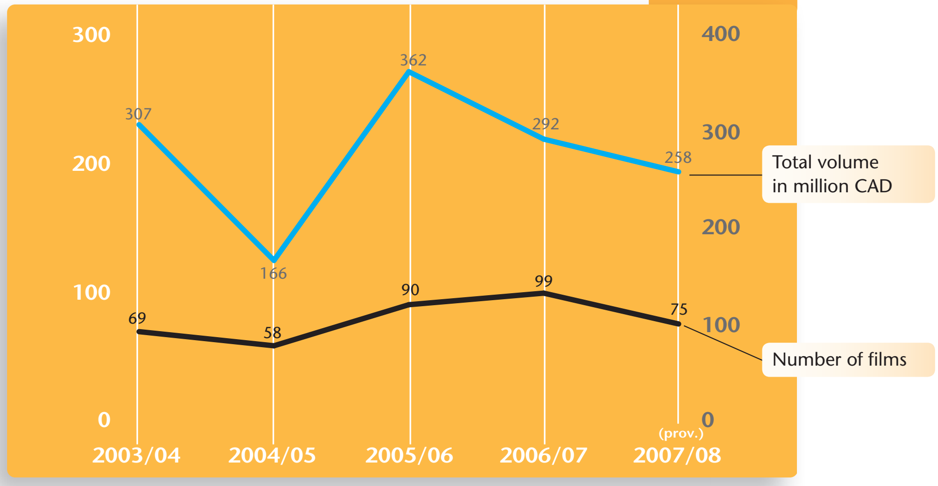
Market shares 2008 e



Total number of Canadian theatrical films | 2003/04 -2007/08

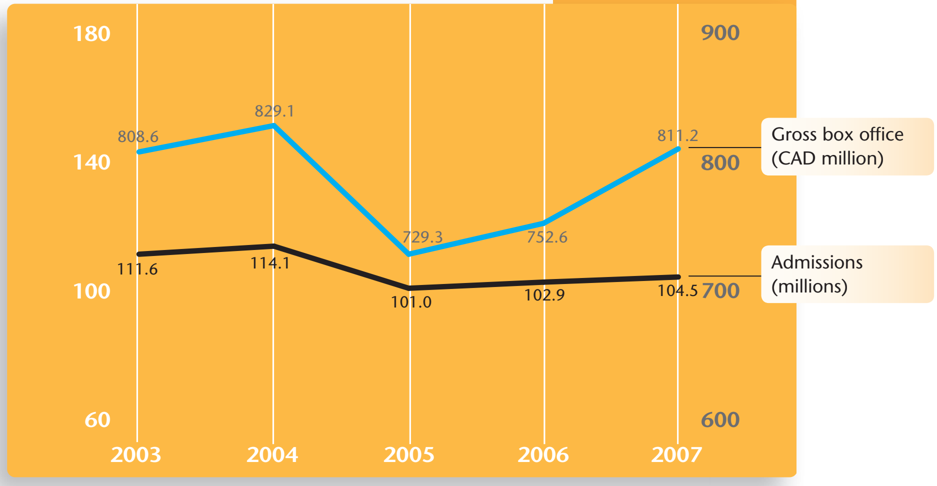
Estimates on the basis of CAVCO data.

Source: CFTPA



Admissions and gross box office | 2003-2007

Sources: Statistics Canada



Top 20 films by admissions in Québec | 2008

	Original title	Country of origin	Director	Distributor	Admissions
1	The Dark Knight	US/GB inc	Christopher Nolan	Warner Bros.	994 421
2	Indiana Jones and the Kingdom of…	US	Steven Spielberg	Paramount	670 528
3	Iron Man	US	Jon Favreau	Paramount	580 587
4	Quantum of Solace	US/GB inc	Marc Forster	Sony Pictures	480 750
5	Hancock	US	Peter Berg	Sony Pictures	478 625
6	Twilight	US	Catherine Hardwicke	Les Films Séville	464 733
7	Madagascar: Escape 2 Africa	US	Darnell, McGrath	Paramount	456 955
8	WALL·E	US	Andrew Stanton	Buena Vista	438 546
9	Cruising Bar 2	CA	Côté, Ménard	Alliance Vivafilm	428 356
10	Kung Fu Panda	US	Osborne, Stevenson	Paramount	422 117
11	Journey to the Center of the Earth	US	Eric Brevig	Alliance Vivafilm	369 479
12	Step Up 2: The Streets	US	Jon Chu	Buena Vista	360 775
13	The Mummy: Tomb of the Dragon…	US/DE	Rob Cohen	Universal	316 574
14	National Treasure: Book of Secrets	US	Jon Turteltaub	Buena Vista	298 449
15	Sex and the City	US	Michael Patrick King	Alliance Vivafilm	292 303
16	The Chronicles of Narnia: Prince…	US/GB inc	Andrew Adamson	Buena Vista	290 234
17	Babine	CA	Luc Picard	Alliance Vivafilm	286 615
18	Wanted	US/DE/RU	Timur Bekmambetov	Universal	280 504
19	Mamma Mia!	US/GB inc	Phyllida Lloyd	Universal	277 189
20	Dans une galaxie près de chez vous 2	CA	Philippe Gagnon	TVA Films	261 453

Sources: Institut de la statistique du Québec

Production

The number of Canadian feature films produced between April 2007 and March 2008 decreased by 24% from the previous year's level, dropping from 99 to 75 feature films. Reduced production activity caused total production volume to decline by 12% to CAD 258 million while average production costs for a local fiction feature increased by 6% to CAD 3.4 million. However, the increase in average production cost was mainly due to a small number of high-budget English-language films. Median production costs actually declined from CAD 2.5 to CAD 2.1 million. This was particularly true for French-language feature films, where median budgets dropped from CAD 2.3 million to CAD 1.3 million, indicating a larger share of lower-budget films. With a strong Canadian dollar for the most part of 2008 combined with lucrative tax credits in several US states, the Canadian production industry had difficulty attracting US productions to shoot in Canada. Given a weaker Canadian dollar and the Federal Governments decision to maintain its 16% federal tax credit to foreign productions, the country's production facilities are hoping to see big budget productions return in 2009.

Distribution and Exhibition

According to Statistics Canada 104.5 million cinema tickets were sold in 2007, generating a gross box office of CAD 811 million. The Motion Picture Theatre Association of Canada (MPTAC) reported Canadian gross box office as increasing by 7.2% from CAD 858 million in 2007 to CAD 920 million in 2008. According to CFTPA /MPTAC the total number of films on release remained high with 624 in 2008, compared to 629 the year before. US films dominated the market taking a market share of 88.5%. Despite the fact that the number of Canadian films on release increased from 112 to 122 films, national market share continued to decrease to 2.8%, the lowest level since 2002. *Passchendaele* became last year's most successful local film grossing CAD 4.4 million. The number of foreign films on release remained stable with 203 foreign films slightly increasing their market share from 7.8% in 2007 to 8.7%. Box office for French-language films continued to fall by 2.0% to CAD 126 million while English-language films grossed CAD 795 million, an increase of 9.0% year-on-year. Canadian productions accounted for 13.8% of French-language box office and for 1.1% of English-language box office.

Sources: CFTPA/MPTAC, Observatoire de la culture et des communications de Québec, Statistics Canada, *Screen International*, *Variety*

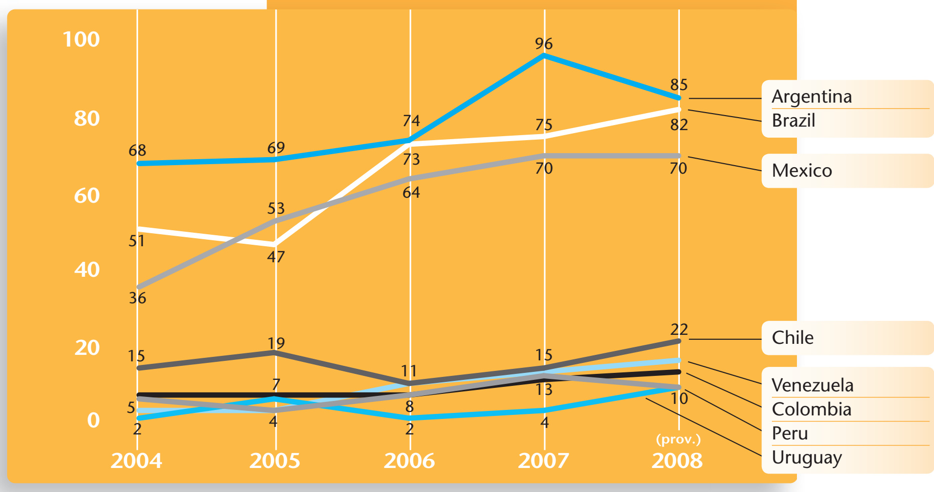
Latin America

	Argentina	Bolivia	Brazil	Chile	Colombia	Mexico	Peru	Uruguay	Venezuela
Population 2008 e (million)	39.7	10.0	191.9	16.8	48.3	106.3	28.5	3.2	28.1
GDP per capita 2008 e (USD)	8 522	1 889	8 676	10 814	5 174	10 747	4 610	8 860	11 828
Gross box office 2008 e (USD)	115	2.5 (1)	395	60	73	662	56	10	128
Admissions 2008 e (millions)	30.8	1.5 (1)	89.6	11.9	21.5	178.0	18.5	2.2	22.0
Admissions per capita 2008 e	0.77	0.15 (1)	0.47	0.71	0.45	1.67	0.65	0.69	0.78
Average ticket price 2008 e (USD)	3.74	1.67 (1)	4.41	5.08	3.39	3.72	3.04	4.40	5.82
Screens 2008	1 029	49 (1)	2 278	583	472	3 920	285	148	414
Inhabitants per screen 2008 e	38 626	200 571 (1)	84 227	28 784	102 275	27 121	100 011	21 622	67 754
Digital screens March 2009 (2)	11	~	35	7	10	55	7	1	~
National market share 2008 e	11.9%	~	9.8%	7.9%	10.3%	7.0%	3.0%	4.5%	2.4%

(1) 2007 (2) Data provided by Fundación del Nuevo Cine Latinoamericano.

Number of feature films produced in Latin America | 2004-2008 e

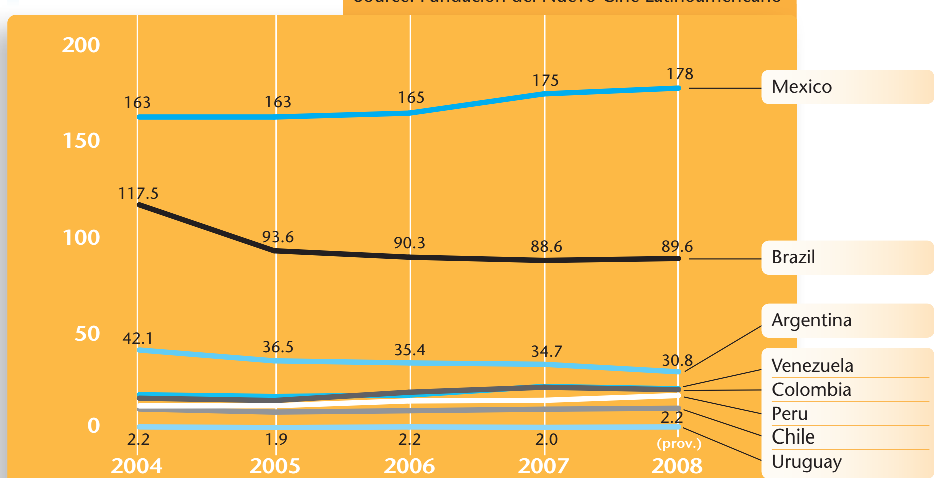
Sources: Fundación del Nuevo Cine Latinoamericano, Imcine



Admissions in Latin America | 2004-2008 e

In millions.

Source: Fundación del Nuevo Cine Latinoamericano



Mexico

2008 saw a small 1.7% increase in cinema attendance in Mexico, growing from 175 million to 178 million. Driven by an increasing average ticket price of MXN 11.17 (USD 3.72) gross box office revenues reached MXN 7 390 million (USD 662 million) in 2008, up 9.7% year-on-year. Facing problems similar to those in Brazil and Argentina, an ever-increasing number of national productions failed to boost national market share. With no domestic film making it into the top 10, national market share remained stable at around 7%. Encouraged by public funding local production activity jumped from only 29 feature films in 2003 to 70 feature productions in the past two years. In 2008, 57 films were produced with state support while 13 projects were entirely funded by private capital. 49 Mexican films were released during the year, fighting for screen space with US blockbusters. 2008 did not see much movement in the exhibition sector, with the total screen base increasingly slightly by 0.3%, numbering to 3 920 screens. With 49 digital screens in early 2009 Mexico leads the digital transition in Latin American countries.

Brazil

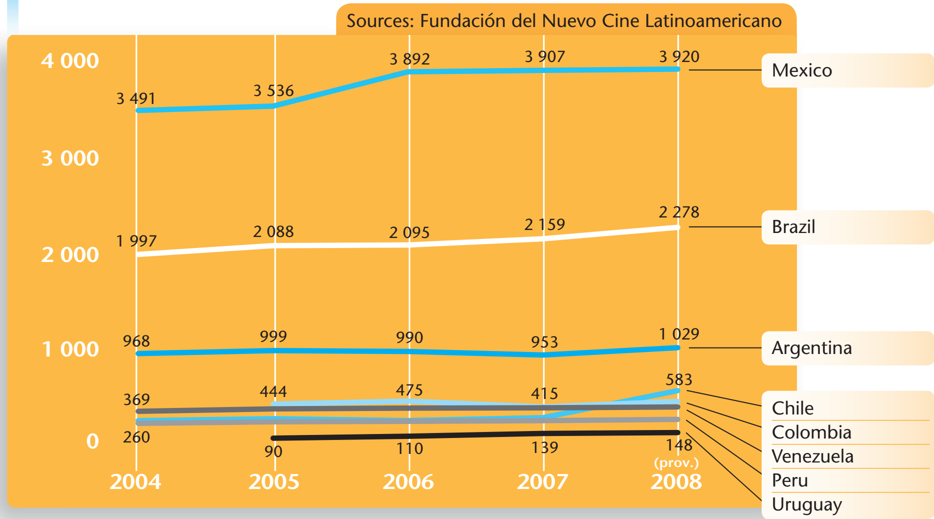
Thanks to a strong second-half, admissions remained stable in Brazil, slightly increasing by 1.1% to 89.6 million. With a slightly higher average ticket price of BRL 8.1 (USD 4.41) gross box office revenues grew by 3.0% to BRL 727.8 million (USD 395 million). Despite an ever-growing number of national releases, market share for domestic films continued its downward trend, falling from 21.4% in 2003 to 9.8% in 2008, 1.8% percentage points down from 2007. According to industry players this development is partly caused by existing public funding schemes aiming at the production of art-house feature films not designed for mainstream success. In past years Brazilian producers had been benefitting from government incentives of about USD 90 million a year, which contributed to production activity increasing significantly over the years. While there were only 30 national films released in 2003, this figure has climbed continuously to 82 in 2008. In order to correct this development the Brazilian cinema agency Ancine has introduced a new market-driven incentive scheme. The so-called Sector Fund will be a refundable system aimed at increasing the number of Brazilian films able to sell more than 1 million tickets from the current 6 to 8 films to 10 to 12 per year. *Meu nome nâo é Johnny (My Name Ain't Johnny)*, a film based on the true story of one of the country's most infamous drug dealers in the 80's and 90's, was the only national film to make it into the top 10. Theatrical screens grew by 5.5% in 2008 reaching a total of 2 278 screens. There were 35 digital screens operational in the first quarter of 2009.

Argentina

Argentinean cinema attendance dropped by 11.2% according to figures provided by INCAA, the country's film institute. Admissions fell from 34.7 million in 2007 to 30.8 million in 2008. Average ticket price increased by 22.7% to ARS 11.8 (USD 3.74) and caused gross box office revenues to increase by 8.9% to ARS 365 million (USD 115 million). The 85 national films took a market share of 11.9%, almost 3 percentage points up from 2007. This was largely thanks to Juan Taratuto's comedy *Un novio para mi mujer (A Boyfriend For My Wife)*, the only local film to make it into the top 10, taking second place after chart topping *Kung Fu Panda*. US films once more dominated the market accounting for 9 out of the top 10 films and generating an estimated market share of 80%, compared to 82% in the previous year. Market share for European, Asian and other Latin American films remained fairly stable at 8.6%. Production activity decreased from 96 national films released in 2007 to 85 in 2008 but remained well above the levels seen between 2003 and 2006 2003 and 2006 (from 53 to 74 releases). In late 2008 INCAA raised the maximum amount of film grants from USD 758 000 to USD 1.1 million. The measure responds to producers' struggles with rising production costs, which grew from USD 394 000 to USD 697 000 over the past year driven by an annual inflation of 25%. In the exhibition sector, a net increase of 76 new screens brought the total screen base to 1 029. In early 2009 INCAA introduced stiffer exhibition regulations, forcing exhibitors to screen local films for at least two weeks in order to secure screen space for local films. As of March 2009 there were 11 digital screens operational in Argentina.

Sources: Fundación del Nuevo Cine Latinoamericano, INCAA, Imcine, Ancine, *Screen International, Variety*

Number of screens in Latin America | 2004-2008 e



Top 10 films by admissions in Mexico | 2008

Estimated admissions in Mexico based on average ticket price of USD 3.72.

	Original title	Country of origin	Director	Admissions e
1	The Dark Knight	US/GB inc	Christopher Nolan	6 713 972
2	Kung Fu Panda	US	Mark Osborne, John Stevenson	5 916 749
3	Iron Man	US	Jon Favreau	5 305 310
4	The Chronicles of Narnia: Prince Caspian	US/GB inc	Andrew Adamson	5 184 389
5	WALL·E	US	Andrew Stanton	4 754 365
6	10,000 BC	US/GB inc	Roland Emmerich	4 639 825
7	Madagascar: Escape 2 Africa	US	Eric Darnell, Tom McGrath	4 535 388
8	The Mummy: Tomb of the Dragon Emperor	US/DE	Rob Cohen	4 142 843
9	Hancock	US	Peter Berg	3 812 602
10	Journey to the Center of the Earth	US	Eric Brevig	3 730 227

Source: IMCINE

Top 10 films by admissions in Brazil | 2008

	Original title	Country of origin	Director	Admissions in millions
1	The Dark Knight	US/GB inc	Christopher Nolan	4.0
2	Kung Fu Panda	US	Mark Osborne. John Stevenson	3.8
3	Madagascar: Escape 2 Africa	US	Eric Darnell. Tom McGrath	3.5
4	Iron Man	US	Jon Favreau	2.8
5	Hancock	US	Peter Berg	2.7
6	Indiana Jones and the Kingdom of the Crystal Skull	US	Steven Spielberg	2.4
7	I Am Legend	US	Francis Lawrence	2.2
8	The Mummy: Tomb of the Dragon Emperor	US/DE	Rob Cohen	2.2
9	Meu nome nâo é Johnny (My Name Ain't Johnny)	BR	Mauro Lima	2.1
10	Quantum of Solace	US/GB inc	Marc Forster	1.8

Sources: Filme-B, Ancine

Top 10 films by admissions in Argentina | 2008

	Original title	Country of origin	Director	Admissions
1	Kung Fu Panda	US	Mark Osborne, John Stevenson	1 550 000
2	Un novio para mi mujer	AR	Juan Taratuto	1 450 000
3	The Dark Knight	US/GB inc	Christopher Nolan	1 350 000
4	WALL·E	US	Andrew Stanton	1 250 000
5	Madagascar: Escape 2 Africa	US	Eric Darnell, Tom McGrath	1 200 000
6	The Chronicles of Narnia: Prince Caspian	US/GB inc	Andrew Adamson	1 000 000
7	Enchanted	US	Kevin Lima	900 000
8	Indiana Jones and the Kingdom of the Crystal Skull	US	Steven Spielberg	780 000
9	The Mummy: Tomb of the Dragon Emperor	US/DE	Rob Cohen	700 000
10	I Am Legend	US	Francis Lawrence	640 000

Sources: INCAA, Otros Cines

Top 10 films by admissions in Venezuela | 2008

Estimated admissions in Venezuela based on average ticket price of USD 5.82.

	Original title	Country of origin	Director	Admissions [e]
1	Madagascar: Escape 2 Africa	US	Eric Darnell, Tom McGrath	937 298
2	Kung Fu Panda	US	Mark Osborne, John Stevenson	798 661
3	The Mummy: Tomb of the Dragon Emperor	US/DE	Rob Cohen	792 299
4	WALL·E	US	Andrew Stanton	688 103
5	Hancock	US	Peter Berg	619 398
6	The Dark Knight	US/GB inc	Christopher Nolan	599 700
7	The Chronicles of Narnia: Prince Caspian	US/GB inc	Andrew Adamson	565 872
8	Get Smart	US	Peter Segal	523 194
9	10,000 BC	US/GB inc	Roland Emmerich	477 718
10	Twilight	US	Catherine Hardwicke	475 621

Sources: CNAC, OBS

Top 10 films by admissions in Peru | 2008

Estimated admissions in Peru based on average ticket price of USD 3.04.

	Original title	Country of origin	Director	Admissions [e]
1	Kung Fu Panda	US	Mark Osborne, John Stevenson	783 838
2	Journey to the Center of the Earth	US	Eric Brevig	679 357
3	Madagascar: Escape 2 Africa	US	Eric Darnell, Tom McGrath	675 344
4	The Mummy: Tomb of the Dragon Emperor	US/DE	Rob Cohen	589 009
5	Iron Man	US	Jon Favreau	501 047
6	The Dark Knight	US/GB inc	Christopher Nolan	478 092
7	WALL·E	US	Andrew Stanton	454 160
8	Hancock	US	Peter Berg	453 174
9	The Chronicles of Narnia: Prince Caspian	US/GB inc	Andrew Adamson	449 933
10	Indiana Jones and the Kingdom of the Crystal Skull	US	Steven Spielberg	439 909

Sources: Conacine, OBS

Top 10 films by admissions in Chile | 2008

Estimated admissions in Chile based on average ticket price of USD 5.08.

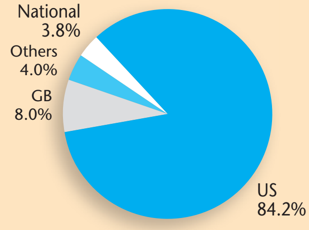
	Original title	Country of origin	Director	Admissions [e]
1	WALL·E	US	Andrew Stanton	651 901
2	The Dark Knight	US/GB inc	Christopher Nolan	637 525
3	Kung Fu Panda	US	Mark Osborne, John Stevenson	602 370
4	The Chronicles of Narnia: Prince Caspian	US/GB inc	Andrew Adamson	436 025
5	Madagascar: Escape 2 Africa	US	Eric Darnell, Tom McGrath	398 324
6	Bolt	US	Byron Howard, Chris Williams	366 694
7	Journey to the Center of the Earth	US	Eric Brevig	350 309
8	The Mummy: Tomb of the Dragon Emperor	US/DE	Rob Cohen	282 201
9	Iron Man	US	Jon Favreau	272 286
10	Hancock	US	Peter Berg	271 110

Sources: CNCA, OBS

Australia

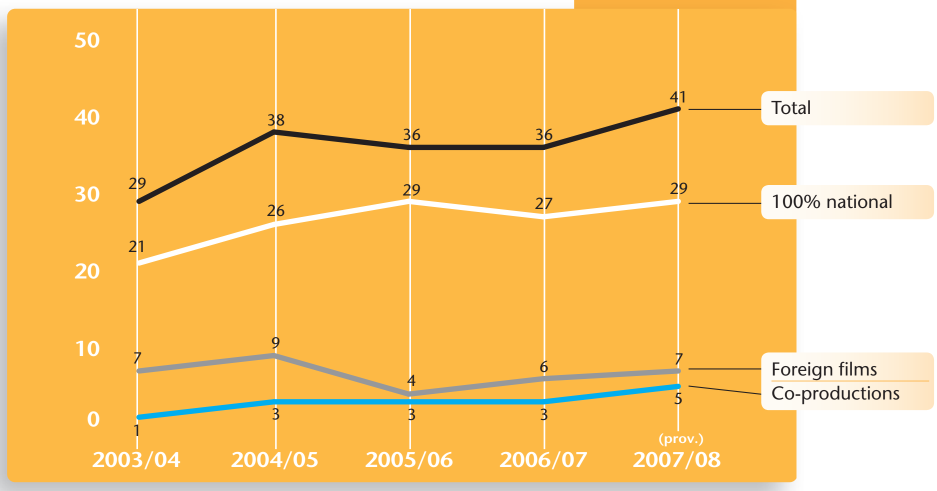
Population 2008 [e]	21.3 million
GDP per capita 2008 [e]	50 150 USD
Average USD/AUD exchange rate 2008	1 USD = 1,20 AUD
Admissions 2008	84.6 million
Average admissions per capita 2008	3.97
Average ticket price 2008	11.17 AUD (9.34 USD)
Screens 2007 | 2008	1 941 | 1 980
Inhabitants per screen 2007 | 2008	10 850 | 10 769
Digital screens 2007 | 2008 [e]	30 | 54

Market shares 2008



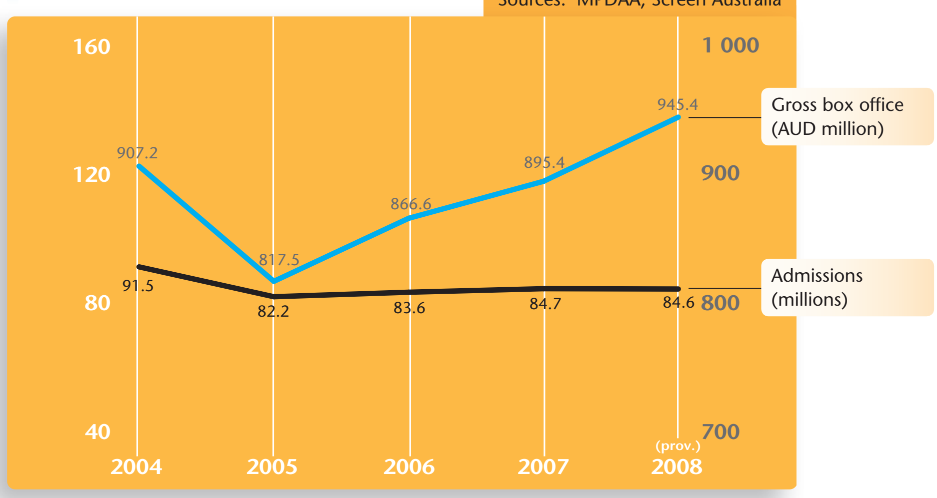
Number of films produced in Australia | 2004-2008

Source: Screen Australia



Admissions and gross box office | 2004-2008

Sources: MPDAA, Screen Australia



Top 20 films by admissions in Australia | 2008

Estimated admissions based on average ticket price of AUD 11.17.

	Original title	Country of origin	Director	Distributor	Admissions [e]
1	The Dark Knight	US/GB inc	Christopher Nolan	Warner Bros	4 098 582
2	Mamma Mia!	US/GB inc	Phyllida Lloyd	Universal	2 841 034
3	Indiana Jones and the Kingdom…	US	Steven Spielberg	Paramount	2 622 181
4	Quantum of Solace	GB inc/US	Marc Forster	Sony	2 590 951
5	Sex and the City	US	Michael Patrick King	Roadshow	2 414 638
6	Australia	US/AU	Baz Luhrmann	Fox	2 409 648
7	Kung Fu Panda	US	M. Osborne, J. Stevenson	Paramount	2 312 433
8	I Am Legend	US	Francis Lawrence	Roadshow	2 076 929
9	Hancock	US	Peter Berg	Sony	1 841 771
10	Iron Man	US	Jon Favreau	Paramount	1 789 773
11	WALL-E	US	Andrew Stanton	Walt Disney	1 609 351
12	Alvin and the Chipmunks	US	Tim Hill	Fox	1 578 755
13	Get Smart	US	Peter Segal	Roadshow	1 523 091
14	27 Dresses	US	Anne Fletcher	Fox	1 391 219
15	Madagascar: Escape 2 Africa	US	E. Darnell, T. McGrath	Paramount	1 290 305
16	Twilight	US	Catherine Hardwicke	Hoyts	1 261 155
17	The Chronicles of Narnia…	GB inc/US	Andrew Adamson	Walt Disney	1 238 536
18	Horton Hears A Who!	US	J. Hayward, S. Martino	Fox	1 055 434
19	American Gangster	US	Ridley Scott	Universal	1 051 521
20	Juno	US/CA/HU	Jason Reitman	Fox	1 049 609

Sources: Screen Australia, MPDAA

Distribution and Exhibition

Australian gross box office earnings reached a record high of AUD 945 million (USD 790 million) in 2008, up 5.6% from 2007 and only the second year (after 2004) in which GBO broke the AUD 900 million barrier. Box office growth was fuelled by an increasing average ticket price, rising by 7.7% to AUD 11.2, while admissions decreased marginally by 1.2% to 84.6 million tickets sold. A total of 392 films were on release during 2008 ; 303 new releases and 89 hold-overs or re-releases. National market share fell from 4% in 2007 to 3.8% and remained below the 10 year average of 4.4%. *Australia* was the only national film to make it into the top 20. Led by *The Dark Knight* US films dominated the market with a share of 84.2%, 6.5 percentage points up from 2007. After falling in 2007 for the first time since 1987, screens numbers were up again in 2008 by 2%. According to the MPDAA there were a total of 54 digital screens by the end of 2008, up from 30 in 2007. Of these 54 digital screens, 37 were equipped with 2K technology. 2009 brought good news to the country's online film distribution sector with the Australian government's decision to build a national broadband fibre network across the entire country.

Production and Funding

Production activity in Australia increased in 2007/08 with 41 feature films produced, 5 films up from previous years' levels. This figure splits into 29 Australian films, 5 co-productions and 7 foreign films. Total budget expenditure for national productions amounted to AUD 128 million, significantly down from the previous year's AUD 220 million which was inflated by the high-budget feature *Australia*, and compared to a five-year average of AUD 147 million. Only Australian films and official co-productions qualify for the Producer Offset incentive under which film-makers can claim back 40% of their Australian expenditure. Films have to pass a cultural test to qualify for the scheme which became officially operational in July 2008 and contributed an estimated AUD 19 million to 11 projects in 2007/08. It is administered by the newly established Screen Australia, an Australian Government agency, bringing together the functions of the Film Finance Corporation Australia, Film Australia and the Australian Film Commission. With a budget of AUD 100 million (USD 86 million) Screen Australia is in practice responsible for all Federal Government support for feature, documentary and television production.

Sources: Screen Australia, MPDAA, *Screen International*

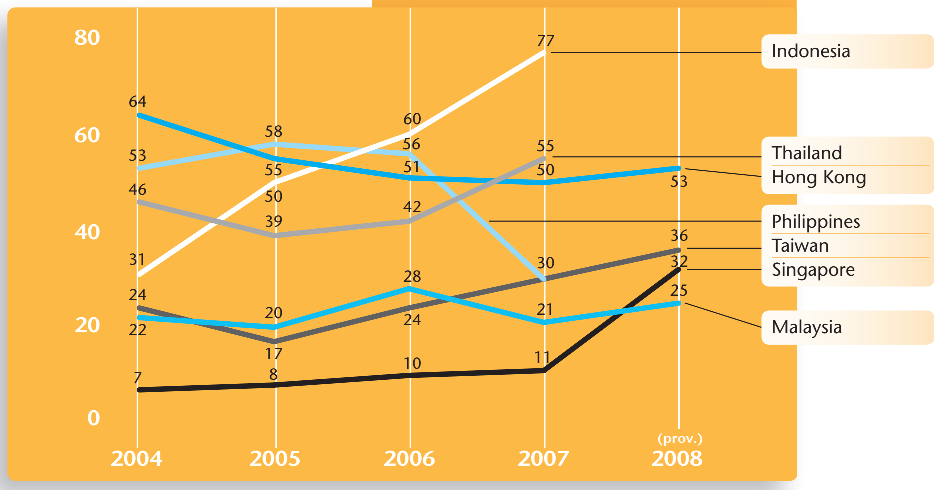
Asia

	Hong Kong	Indonesia	Malaysia	Philippines	Singapore	Taiwan	Thailand
Population 2008 e (millions)	7.0	227.8	27.3	90.3	4.7	23.2	66.4
GDP per capita 2008 e (USD)	31 849	2 181	7 866	1 908	41 291	18 306	4 099
Gross box office 2008 e (USD)	140.3	100.9 (1)	114.0	103.2 (1)	107.4	151.9	129.9 (1)
Admissions 2008 e (milions)	19.4 (1)	48.0 (1)	43.9	64.1 (1)	19.0	21.5	32.6 (1)
Admissions per capita 2008 e	2.79 (1)	0.21 (1)	1.61	0.72 (1)	4.07	0.93	0.50 (1)
Average ticket price 2008 e (USD)	6.63 (1)	2.10 (1)	2.60	1.61 (1)	5.65	7.06	3.98 (1)
Screens 2008	190	681 (1)	453	765 (1)	177	580	704 (1)
Inhabitants per screen e 2008	36 979	330 257 (1)	60 258	115 783 (1)	26 373	39 940	93 381 (1)
Digital screens 2007 | June 2008	4 | 8	3 | 3	~ | 3	1 | 3	27 | 28	10 | 18	7 | 15
National market shares 2008 e	23.0%	~	12.1%	~	9.2%	12.1%	45.0%

(1) 2007

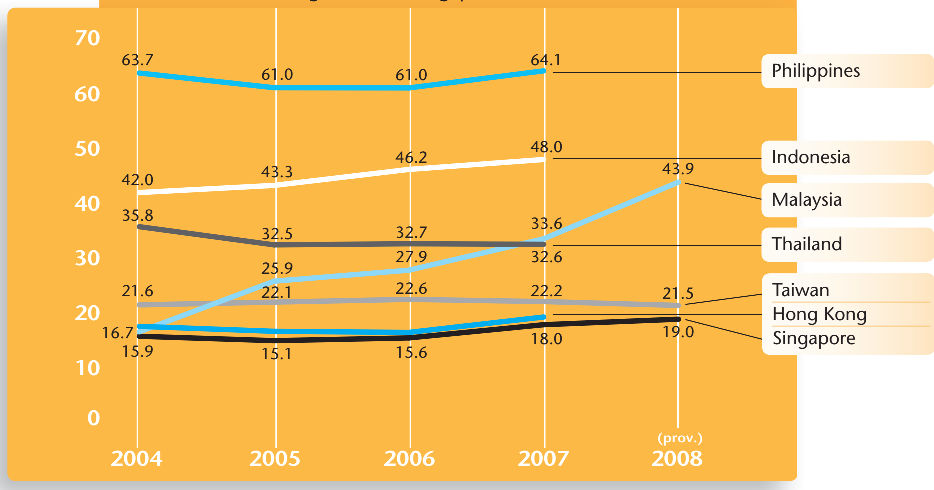
Number of feature films produced in Asia | 2004-2008

Sources: OBS, Screen Digest, Screen Int., FINAS, Singapore Film Commission, Taiwan Cinema



Cinema attendance in selected Asian countries | 2004-2008

Sources: OBS, Screen Digest, FINAS, Singapore Film Commission, Taiwan Cinema



Top 10 films by GBO in Hong Kong | 2008

	Original title	Country of origin	Director	Box office in USD million
1	The Dark Knight	US/GB inc	Christopher Nolan	7.55
2	Cheung Gong 7 hou (CJ7)	HK/CN	Stephen Chow	6.64
3	The Mummy: Tomb of the Dragon Emperor	US/DE	Rob Cohen	4.85
4	Journey to the Center of the Earth	US	Eric Brevig	4.52
5	Kung Fu Panda	US	M. Osborne. J. Stevenson	4.06
6	Enchanted	US	Kevin Lima	3.61
7	Indiana Jones and the Kingdom of the…	US	Steven Spielberg	3.46
8	The Chronicles of Narnia: Prince Caspian	GB inc/US	Andrew Adamson	3.29
9	Chi bi (Red Cliff)	CN/JP/KR/TW	John Woo	3.13
10	Hancock	US	Peter Berg	3.05

Source: *Screen International*

Top 10 domestic films by GBO in Hong Kong | 2008

	Original title	Country of origin	Director	Box office in USD million
1	Cheung Gong 7 hou (CJ7)	HK/CN	Stephen Chow	6.64
2	Chi bi (Red Cliff)	CN/JP/KR/TW	John Woo	3.13
3	Ip Man (The Legend of Yip Man)	HK	Wilson Yip	2.33
4	Saam gwok dzi gin lung se gap (3 Kingdoms...)	HK/CN/KR	Daniel Lee	2.19
5	Bo chi tung wah (Connected)	HK/CN	Benny Chan	1.76
6	Ngor dik dzui oi (L for Love, L for Lies)	HK	Patrick Kong	1.62
7	Wa pei (Painted Skin)	CN/HK/SG	Gordon Chan	1.34
8	Gong fu guan lan (Kungfu Dunk)	CN/HK/TW	Yen-ping Chu	1.13
9	Noi yee sil nui (La Lingerie)	HK	Hing-Ka Chan. Janet Chun	1.10
10	Ching yan (The Beast Stalker)	HK	Dante Lam	1.03

Source: *Screen International*

Hong Kong

For the second year in a row Hong Kong box office broke the HKD 1 billion barrier, growing 8% year-on-year to HKD 1.1 billion (USD 140 million). Box office growth was driven by an increase in multiplex screens and a strong line-up, particularly of foreign films which accounted for 8 out of the top 10 films in 2008. Led by *The Dark Knight, The Mummy* sequel and *Journey to the Center of the Earth,* foreign films took a market share of 77%. National market share remained low at 23%, compared to 31% in 2006, with *CJ7* and *Red Cliff* the only two domestic films to make it into the top 10. Both films were co-productions involving mainland China, representative of a trend which sees the Hong-Kong film industry increasingly collaborating with the fast growing mainland Chinese market with many big players setting up co-production companies in China. Production levels increased slightly from a record low of 50 films in 2007 to 53 in 2008.

Taiwan

Cinema attendance decreased slightly by 3% to 21.5 million admissions in 2008. Admissions levels have been more or less stable over the past 5 years, fluctuating around 22 million. Fuelled by a comparatively high average ticket price of USD 7.1, gross box office amounted to USD 152 million, making Taiwan one of the largest Asian cinema markets after India, China, Japan and South Korea. Helped by the huge success of chart-topping *Cape No. 7,* which generated USD 6.9 million until November and was still on release, national market share continued to rise from 7.4% in 2007 to 12% in 2008. Taiwanese film production grew to 36 films in 2008, compared to 30 in 2007. The digital screen base increased from 10 to 18 screens by mid-2008.

Malaysia

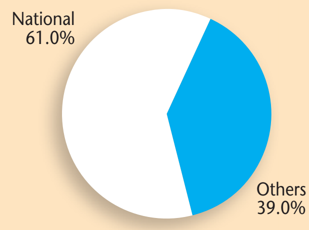
2008 saw another year of strong growth for Malaysian cinema markets with admissions growing by 31% to 43.9 million in 2008. Thanks to the opening of 100 new screens, gross box office grew to MYR 381 million (USD 114 million). Chinese *CJ7* topped the box office chart followed by international blockbusters *Iron Man, The Mummy* sequel and *Quantum of Solace.* National market share amounted to 12.1%. Local production levels increased from 21 features in 2007 to 25 films in 2008.

Sources: *Screen International*, MPIA, FINAS, Taiwan Cinema, Screen Digest, OBS

People's Republic of China

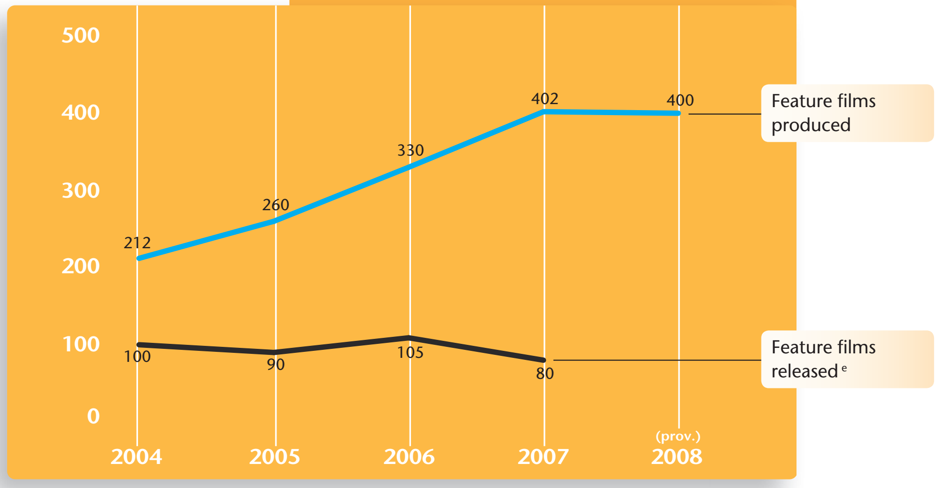
Population 2008 [e]	1 327.7 million
GDP per capita 2008 [e]	3 180 USD
Average USD/CNY exchange rate 2008	1 USD = 6.96 CNY
Gross box office 2008 (millions)	4 220 CNY (606 USD)
Admissions 2007 [e]	195.8 million
Average admissions per capita 2007 [e]	0.15
Average ticket price 2007	16.85 CNY (2.21 USD)
Screens 2007 I 2008	36 112 I ~
Modern screens 2007 I 2008	3 527 I 4 097
Digital screens 2007 I 2008 [e]	564 I 800

Market shares 2008



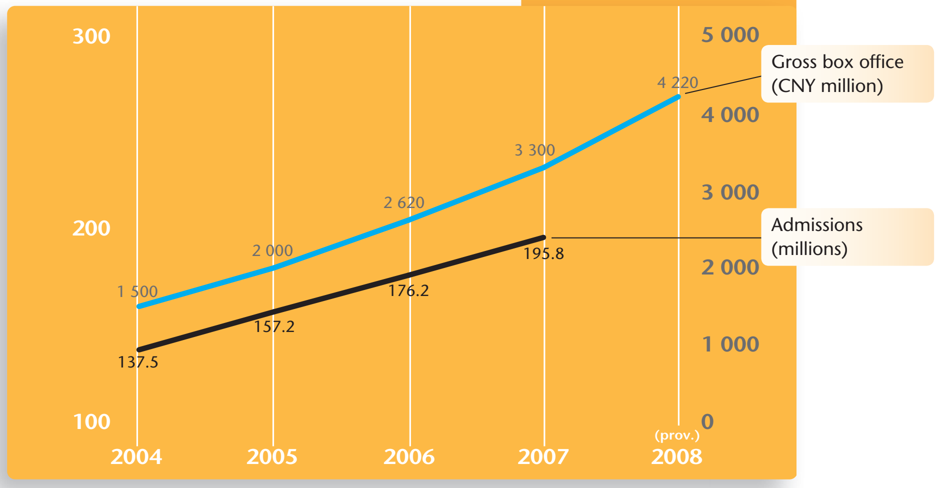
Number of feature films produced and released | 2004-2008

Sources: SARFT, Screen Digest, *Variety*, *Screen International*



Admissions and gross box office | 2004-2008

Sources: SARFT, Screen Digest



Top 10 films by box office in China | 2008

	Original title	Country of origin	Director	Distributor	Gross box office in USD million
1	Chi bi (Red Cliff)	CN	John Woo	China Film Group	45.7
2	Wa pei (Painted Skin)	CN/HK/SG	Gordon Chan	Bejing Time	33.7
3	Cheung Gong 7 hou (CJ7)	HK/CN	Stephen Chow	China Film Group	29.6
4	The Forbidden Kingdom	US/CN	Rob Minkoff	Huyai Brothers	27.2
5	Kung Fu Panda	US	Osborne. Stevenson	China Film Group	26.4
6	Fei Cheng Wu Rao (If You are…)	CN	Xiaogang Feng	Huayi Brothers	24.9
7	Quantum of Solace	GB inc/US	Marc Forster	China Film Group	20.8
8	Gong fu guan lan (Kungfu Dunk)	CN/HK/TW	Yen-ping Chu	~	16.5
9	The Mummy: Tomb of…	US/DE	Rob Cohen	China Film Group	16.1
10	Mei Lanfang (Forever Enthralled)	CN/HK	Kaige Chen	Oriental	15.7

Source: *Screen International*

Top 10 international films by gross box office in China | 2008

	Original title	Country of origin	Director	Distributor	Gross box office in USD million
1	Kung Fu Panda	US	Osborne. Stevenson	China Film Group	26.4
2	Quantum of Solace	GB inc/US	Marc Forster	China Film Group	22.3
3	Iron Man	US	Jon Favreau	China Film Group	15.5
4	Hancock	US	Peter Berg	China Film Group	14.8
5	The Chronicles of Narnia…	GB inc/US	Andrew Adamson	China Film Group	12.6
6	10,000 BC	US	Roland Emmerich	China Film Group	11.1
7	Wanted	US/DE/RU	Timur Bekmambetov	China Film Group	10.7
8	National Treasure: Book of Secrets	US	Jon Turteltaub	China Film Group	10.2
9	Journey to the Center of the Earth	US	Eric Brevig	China Film Group	10.0
10	The Incredible Hulk	US	Louis Leterrier	China Film Group	9.4

Source: *Screen International*

Distribution and Exhibition

Gross box office grew by 27% year-on-year reaching CNY 4.22 billion (USD 606 million) in 2008. This marks the sixth year in a row where box office grew at an annual growth rate of over 20%. Increasing numbers of screens, more sophisticated marketing know-how by local distributors and the strength of releases around the holiday seasons are seen as the key factors driving box office growth. Led by the two top grossing films *Red Cliff* and *Painted Skin* and supported by China's import quotas and distribution regulations, national films achieved a market share of 61%. Despite box office growing by 8% on an absolute level, market share for foreign films fell to 39%, the lowest level in years. In the exhibition sector, the total number of modern screens increased by 570 screens to a total of 4 097. Digital screens grew by some 240 screens bringing the total digital screen base to about 800, which is far below the announced target of 2 000 screens by end 2008. It is unclear whether screen growth will continue at such speed in 2009, as cinema projects related to larger real-estate projects might face financing problems due to the financial crisis. This also applies to the digital distribution sector with many VOD enterprises relying heavily on venture capital investments which have become less and less available.

Production

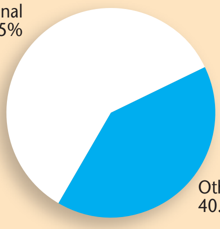
With 400 feature films produced, Chinese film production remained stable in 2008. This stagnation of production activity at a high level comes after years of rapid growth, with production figures climbing from 212 in 2004 to 402 in 2007. According to CMM Intelligence, funding still remains a major bottleneck for the further development of the film industry. About 91% of a film's budget comes from the production companies themselves, about 7% is provided by the government and only 2% comes from the private sector. Against this background the credit crunch is expected to have little impact on China's film production industry in 2009 as it less dependent on bank financing. However, though plans to go public in 2008 were announced by China Film Group, Huayi Bros and Shanghai Film Group, all have put their IPO on hold. 2008 turned out to be a difficult year for international co-operation, with SARFT calling a halt to all co-productions until after the Olympic Games. Shooting permits have become increasingly available towards the end of the year with 17 projects having been approved between October 2008 and January 2009.

Sources: SARFT, *Screen International*, CMM Intelligence, Screen Digest, *Variety*

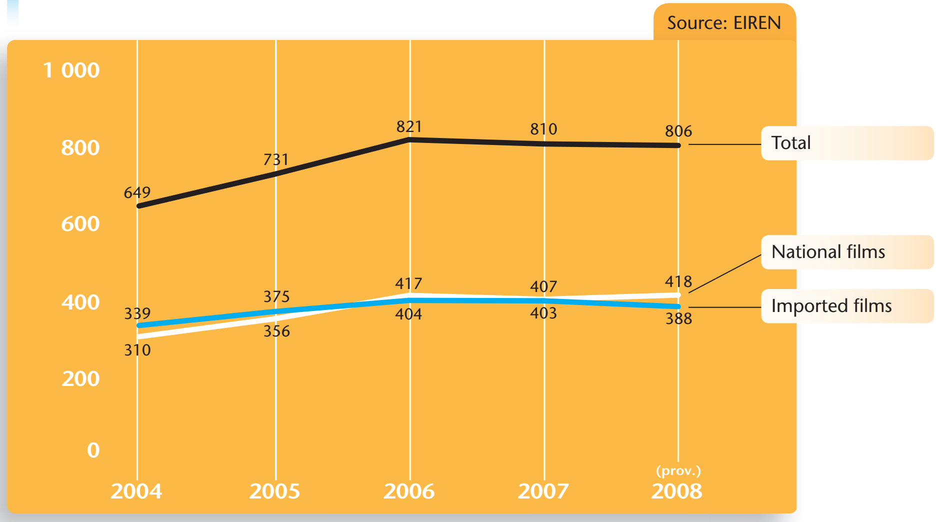
Japan

Population 2008 [e]	127.7 million
GDP per capita 2008 [e]	37 940 USD
Average USD/JPY exchange rate 2008	1 USD = 103.5 JPY
Admissions 2008	160.5 million
Average admissions per capita 2008	1.26
Average ticket price 2008	1 214 JPY (11.73 USD)
Screens 2007 | 2008 [e]	3 221 | 3 359
Screens in multiplexes 2007 | 2008	2 454 | 2 659
Digital screens 2007 | June 2008	86 | 94

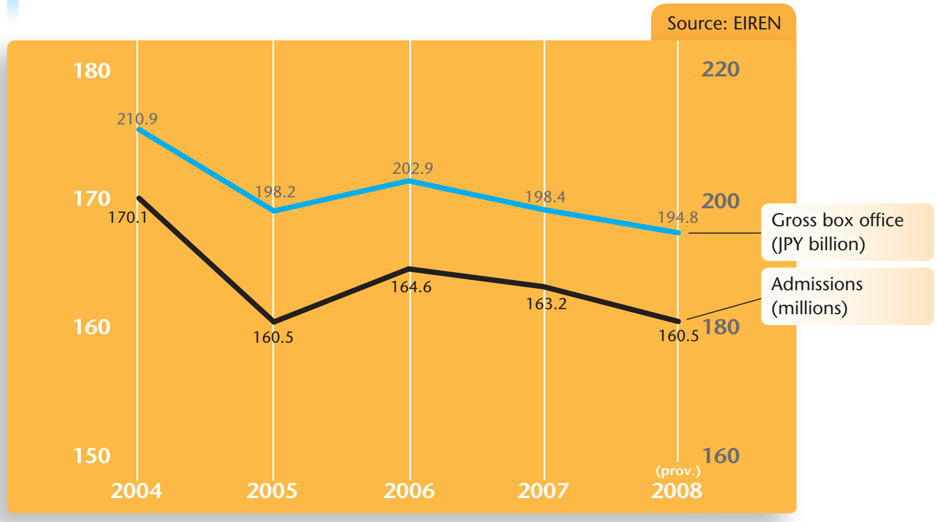
Market shares 2008



Number of films released in Japan | 2004-2008



Admissions and gross box office | 2004-2008



Top 20 films by estimated admissions in Japan | 2008

Estimated admissions based on average ticket price of JPY 1 214.

	Original title	Country of origin	Director	Distributor	Admissions
1	Gake no ue no Ponyo	JP	Hayao Miyazaki	Toho	12 767 710
2	Hana yori dango: Fainaru (Boys over…)	JP	Yasuharu Ishii	Toho	6 383 855
3	Indiana Jones and the Kingdom…	US	Steven Spielberg	Paramount	4 703 460
4	Chi bi (CJ7)	CN	John Woo	Toho-Towa/Avex	4 159 802
5	Yôgisha X no kenshin (Suspect X)	JP	Hiroshi Nishitani	Toho	4 052 718
6	Pokémon: Giratina and the Sky…	JP	Kunihiko Yuyama	Toho	3 953 871
7	Aibo: Gekijo-Ban (Partners: The Movie)	JP	Seiji Izumi	Toei	3 657 331
8	I Am Legend	US	Francis Lawrence	Warner Bros.	3 550 247
9	20-seiki shônen (20th Century Boys)	JP	Yukihiko Tsutsumi	Toho	3 253 707
10	Za majikku awâ (The Magic Hour)	JP	Koki Mitani	Toho	3 228 995
11	The Golden Compass	US/GB inc	Chris Weitz	Schochiku/Gaga	3 088 962
12	Doraemon: Nobita and the Green…	JP	Ayumu Watanabe	Toho	2 775 947
13	A Tale of Mari and Three Puppies	JP	Masanobu Takashima	Toho	2 619 440
14	L: Change the World	JP	Hideo Nakata	Warner Bros.	2 553 542
15	Hancock	US	Peter Berg	Sony Pictures Ent.	2 553 542
16	Okuribito (Departures)	JP	Yojiro Takita	Schochiku	2 512 356
17	The Chronicles of Narnia: Prince…	GB inc/US	Andrew Adamson	Walt Disney	2 471 170
18	Enchanted	US	Kevin Lima	Walt Disney	2 397 035
19	National Treasure: Book of Secrets	US	Jon Turteltaub	Walt Disney	2 125 206
20	Wanted	US/DE/RU	Timur Bekmambetov	Toho-Towa	2 059 308

Sources: EIREN, OBS

Production

With 418 national films released in 2008, Japanese production activity reached its highest level since the early 1970s, though it remained more or less in line with production levels in 2006 and 2007. Amidst stagnating box office results, Japanese production studios tend to stick to producing films based on familiar original content, such as TV series, manga adaptations, novels or animation franchises for which there is significant audience interest. These mainstream Japanese films are generally produced by a consortium consisting of a studio and TV broadcaster as well as distributors, publishers, advertising companies or even home video companies, giving them the possibility to cross-promote the film. US majors like Warner Bros and Walt Disney are increasingly looking to benefit from the popularity of local production, like Warner's *L:Change The World* which took 14th place in 2008. In mid-2008 Walt Disney confirmed its intention to partner with Japanese anime studios Toei Animation, Madhouse Co. and Jinni's Animation Studios to co-produce cartoon specifically tailored to the taste of Asian audiences. The three local majors, Toho, Shochiku and Toei, recently announced plans to invest millions of USD into the digitisation of their studios and post-production facilities.

Distribution and Exhibition

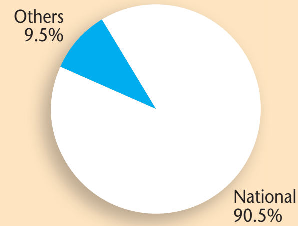
Both gross box office as well as admissions continued to decline in 2008, falling by 1.8% to JPY 195 billion (USD 1.9 billion) and 1.7% to 160 million admissions. The average ticket price decreased slightly to JPY 1 214 (USD 11.7) which represents the lowest ticket price since 1992. Led by Hayao Miyazaki's latest animation film *Ponyo On The Cliff By The Sea*, national films achieved a record market share of 59.5%, the highest level since 1969. With 418 releases, local films also widened the gap with the 388 foreign film releases which accounted for only 40.5% of the total market. However, with proven franchises like *Terminator, Transformers* or *Harry Potter* lining up, an increase in market share for foreign films can be expected in 2009. Releasing 10 out of the top 20 titles and with a market share of 38%, Toho once more led the distribution market, followed by Warner Bros (8.4%) and Schochiku (8.2%). In the exhibition sector, screen numbers continued to increase with an additional 138 screens bringing the total to 3 359. The digital screen base grew by 8 screens to a total of 94 screens by mid-2008.

Sources: EIREN, *Screen International*, Screen Digest, *Variety,* Forbes

India

Population 2008 [e]	1 186.2 million
GDP per capita 2008 [e]	1 043 USD
Average USD/INR exchange rate 2008	1 USD = 43.81 INR
Gross box office 2008 [e] (millions)	80 200 INR (1 830 USD)
Admissions 2007 [e]	3 290 million
Average admissions per capita 2007 [e]	2.81
Average ticket price 2007	21.73 INR (0.53 USD)
Screens 2007 | 2008	10 189 | ~
Screens in multiplexes 2007 | 2008 [e]	~ | 850
Digital screens 2007 | June 2008 [e]	11 | 35

Market shares 2007 [e]



Top 10 Hindi films by net box office in India | 2008

	Original title	Country of origin	Director	Distributor	Net box office in USD million
1	Ghajini	IN	A.R. Murugadoss	Geetha Arts	19.0
2	Singh Is Kinng	IN	Anees Bazmee	~	15.4
3	Rab Ne Bana Di Jodi	IN	Aditya Chopra	Yash Raj Films	14.2
4	Race	IN	A. & M.A. Burmawalla	~	12.1
5	Jodhaa Akbar	IN	Ashutosh Gowariker	~	11.2
6	Jaane Tu Ya Jaane Na	IN	Abbas Tyrewala	PVR Pictures	11.7
7	Golmaal Returns	IN	Rohit Shetty	~	10.4
8	Dostana	IN	Tarun Mansukhani	~	10.0
9	Sarkar Raj	IN	Ram Gopal Varma	~	7.5
10	Bhootnath	IN	Vivek Sharma	~	6.4

Sources: IBOS network, *Screen International*

Production

With a total of 1 132 Indian feature films in 26 languages certified in 2007, up 41 films from the previous year, India remains the film industry with by far the highest production output in the world. Films in Hindi accounted for 22% of total output, followed by Telugu and Tamil films accounting for 21% and 13% respectively. Despite growing production figures, the Indian film industry sees the need for correcting a development which saw production budgets soar mainly due to inflated talent costs. As many of these big budget productions did not meet box office expectations in 2008 and fresh financing has become more difficult to raise, production companies are now focusing on reducing production costs by re-negotiating pay packages for the films' stars and reducing marketing expenditure. While historically talent and key technical cost accounted for about 30% of the budget, its share had increased up to about 75% in past years.

Distribution and Exhibition

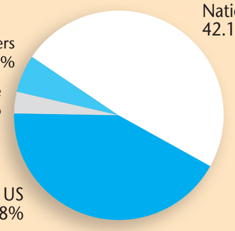
2008 was considered a somewhat difficult year for the Indian box office, with many of the big releases failing to attract enough admissions to recoup their high production costs, particularly in the first half of 2008 where the lack of high quality films and Indian Premier League cricket matches negatively impacted cinema attendance. However blockbusters like *Ghajini* and *Rab Ne Bana Di Jodi* released in the last quarter lived up to expectations and contributed to Indian gross box office revenues increasing by 12%, reaching INR 80.2 billion (USD 1.8 billion) in 2008. The growth in multiplex screens was considered a major growth driver. The first quarter of 2009 saw producers arguing with exhibitors over re-negotiating revenue-sharing terms. In order to underpin their demands the United Producers Forum declared a strike from April 4 onwards, not permitting any new releases in multiplexes until an agreement is reached. The strike affects only multiplexes, which now account for 65% to 70% of India's total box office, and not single screens. To counter low occupancy rates caused by a light release schedule and the sentiment of a general economic downturn many multiplex operators significantly reduced ticket prices in early 2009. Generally considered rather an e-cinema market, India counted a total of 35 digital screens by mid-2008. Piracy is estimated to cost the Indian film industry about USD 1 billion a year and remains a problem particularly in times of economic crisis.

Sources: FICCI, *Screen International*, *Variety*, Screen Digest, *The Times of India*, *Screenindia*

South Korea

Population 2008 e	48.6 million
GDP per capita 2008 e	19 638 USD
Average USD/KRW exchange rate 2008	1 USD = 1 103 KRW
Gross Box Office 2008	KRW 979.4 bn (USD 888 m)
Admissions 2008 e	150.8 million
Average admissions per capita 2008	3.0
Average ticket price 2008 e	6 493 KRW (5.89 USD)
Screens 2007 | 2008	1 975 | 2 081
Digital screens 2007 | June 2008	173 | 188

Market shares 2008 e



Top 10 films by admissions in South Korea | 2008

	Original title	Country of origin	Director	Distributor	Admissions
1	The Good, the Bad, the Weird	KR	Ji-woon Kim	CJ Entertainment	6 685 988
2	Chugyeogja	KR	Hong-jin Na	Showbox, Mediaplex	5 071 619
3	Kung Fu Panda	US	Osborne, Stevenson	CJ Entertainment	4 673 009
4	Mamma Mia!	US/GB inc	Phyllida Lloyd	UPI	4 534 014
5	Kwasok scandle	KR	Hyeong-Cheol Kang	Lotte Entertainment	4 353 173
6	Iron Man	US	Jon Favreau	CJ Entertainment	4 316 003
7	Kang Chul-jung: Gonggongui…	KR	Woo-Suk Kang	CJ Entertainment	4 300 670
8	Indiana Jones and the Kingdom…	US	Steven Spielberg	CJ Entertainment	4 136 101
9	The Mummy: Tomb of the…	US/DE	Rob Cohen	UPI	4 090 795
10	The Dark Knight	US/GB inc	Christopher Nolan	Warner Bros.	4 061 091

Source: KOFIC

Production

Korean production levels fell from a record high of 124 films in 2007 to 113 in 2008. Ongoing profitability problems caused by declining audience interest in local films finally put a preliminary stop to the growth trend, which saw annual production figures rising from 43 to 124 over the past decade. This development is also reflected in lower average production costs, which decreased from around KRW 2.8 billion (USD 2.7 million) between 2003 and 2005 to KRW 2.07 billion (USD 1.88 million) in 2008. International demand for Korean films increased for the first time since 2004, with export volume growing by 40% to a total of USD 20.5 million, falling short of the USD 30.9 million recorded in 2003 but remaining well above the USD 14.9 registered in 2002. With regard to funding, the Ministry of Culture, Sports and Tourism announced investment of a total of USD 274 million into the local cultural and content industries between 2009 and 2013. A special focus will be put on supporting the animation sector, which receives USD 67 million out of this pot. In September 2008 Korea signed a co-production treaty with New Zealand including financial assistance as well as technical support along with easier customs and visa procedures.

Distribution and Exhibition

KOFIC reported admissions falling by 5% from a record high of 159 million in 2007 to 151 million in 2008. This represents the first decline in cinema attendance according to KOFIC figures since 1996, and saw average admissions per capita decline from 3.2 to 3.0. However exhibitor CJ CGV had already reported a 5.5% decline of admissions in 2007. Supported by an increasing average ticket price, gross box office revenues decreased by only 1.3% to KRW 979 billion (USD 888 million). A total of 379 films were released throughout 2008 with 108 Korean films achieving a market share of 42.1%. This compares to a national market share of 64% in 2006 and 50% in 2007 and represents the lowest level since 2000. Local films *The Good, the Bad, the Weird* and *The Chaser* topped the box office charts in 2008. US films, led by *Kung Fu Panda*, took a market share of 49% leaving almost 10% to "third country" films, with signs of diversification to other Asian and European films. Local distributor CJ Entertainment kept its market leading position with a market share of 30%, followed by Showbox / Mediaplex and UPI with 10% each. Screen numbers increased by 106 to a total of 2 081 screens.

Sources: KOFIC, *Screen International*, Screen Digest

Africa

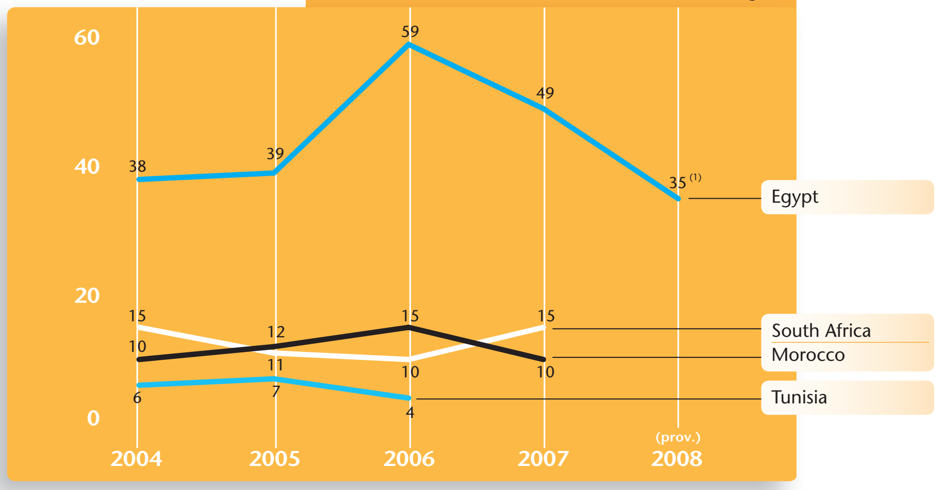
	Algeria	Egypt	Morocco	South Africa	Tunisia
Population 2008 (millions) [e]	34.8	75.1	31.2	48.7	10.4
GDP per capita 2008 (USD) [e]	4 922	2 109	2 902	6 170	4 032
Gross Box Office 2007 (USD millions) [e]	0.01	44.1	7.8	60.2	~
Admissions 2007 (milions) [e]	0.7 (1)	23.8	3.4	26.0	0.3 (2)
Admissions per capita 2007 (USD) [e]	0.02 (1)	0.32	0.09	0.54	0.03 (2)
Average ticket price 2007 (USD) [e]	0.85 (1)	1.85	2.71	2.32	1.76 (2)
Screens 2007	10	400	104	831	27
Digital Screens June 2008	~	~	~	4	~
National Market Share 2007 [e]	~	85% (3)	15%	~	15% (2)

(1) 2006 (2) 2005 (3) 2008

Sources: Dubai International Film Festival, Screen Digest, *Variety*, Euromed

Number of feature films produced in selected African countries | 2004-2008

Sources: Dubai International Film Festival, Screen Digest

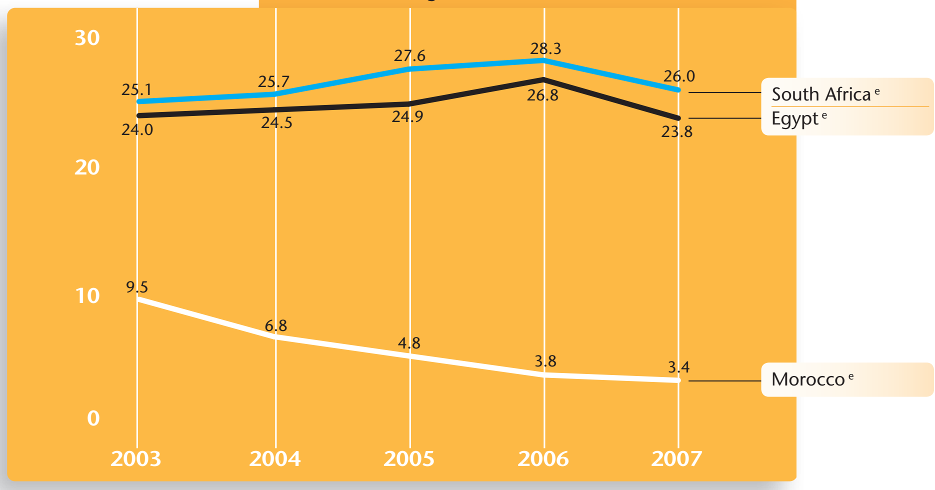


(1) as of 12 November 2008.

Admissions in selected African countries | 2003-2007

In millions.

Sources: Screen Digest, Euromed, CCM, *Les cahiers du cinéma*



Top 10 films by admissions in Egypt [1] | 2008

Estimated admissions based on average ticket price of EGP 22.5.

	Original title	Country of origin	Director	Distributor	Admissions [e]
1	Aasef ala el-iz'ag	EG	Khaled Mara'y	United Artistic Group	977 778
2	Heen Maysara	EG	Khaled Youssef	United Artistic Group	977 778
3	Hassan & Morcos	EG	Rami Emam	United Artistic Group	998 269
4	Captain Hima	EG	Nasr Mahrous	ADCP	711 111
5	H. Dabbour	EG	Ahmed Mekky	ADCP	631 120
6	Cabaret	EG	Sameh Abdel-Aziz	ADCP	622 222
7	El Rayes Omar Harb	EG	Khaled Youssef	ADCP	613 333
8	Masgoun Tranzeet	EG	Sandra Nashaat	United Artistic Group	488 889
9	Tabakh El Rayes	EG	Saied Hamed	United Artistic Group	390 610
10	Nems Bond	EG	Ahmed El badray	United Artistic Group	323 357

(1) as of 12 November 2008.

Sources: Dubai International Film Festival, Nielsen EDI, OBS

Top 10 films by admissions in Morocco [1] | 2008

	Original title	Country of origin	Director	Distributor	Admissions [e]
1	Morgan Ahmed Morgan	EG	Ali Edreess	Channel 4	99 388
2	Whatever Lola Wants	CA/FR	Nabil Ayouch	Zaza Films	88 424
3	Les jardins de Samira	MA	Latif Lahlou	Younes Films	42 244
4	Andalib El Dokki	EG	Wael Ehsan	Younes Films	36 066
5	Hancock	US	Peter Berg	Maghreb Moderne Films	32 751
6	Heya Fawda	EG/FR	Y. Chahine, K. Youssef	Younes Films	31 966
7	Astérix aux jeux olympiques	FR/DE/ES/IT	Forestier, Langmann	Magarama	26 942
8	Indiana Jones and the Kingdom…	US	Steven Spielberg	Magarama	21 555
9	Jumper	US	Doug Liman	Magarama	19 989
10	Wanted	US/DE/RU	Timur Bekmambetov	Magarama	15 691

(1) as of 12 November 2008.

Sources: Dubai International Film Festival, Nielsen EDI

Two separate models of film production

In Africa two different models of film production can be observed, a low-budget, high volume industry supported by video sales and a more conventional industry, in international terms, based on existing networks of production, distribution and exhibition. The Nigerian film industry, Nollywood, leads the first model, producing up to 1 000 and more films each year, which are distributed on DVD, VHS and TV across all of Africa. Average budgets for these films range between USD 5 000 to 10 000, but have started to increase to up to USD 20 000. Inspired by Nollywood's success, other African countries, such as Kenya or Ghana, are increasingly producing local low-budget films.

By contrast, film-making in South Africa, Egypt and Morocco operates in a much more structured environment comparable to international film industries. With about 26 and 24 million admissions, South Africa and Egypt are by far the continent's largest theatrical markets. Egypt, once the centre of film-making for the entire Arab world, has reduced its output from formerly 100 films to about 40 films a year but remains the most prolific African film industry in terms of this kind of production. Average production costs amount to about EGP 15 million (USD 2.7 million). However, a new trend to low-budget films, not exceeding EGP 8 million (USD 1.5 million) has emerged in recent years. Within Egypt the distribution of foreign films is restricted to 8 prints per title, which helped national films achieve a market share of 85% in 2008. Meanwhile Morocco plans to establish itself as a centre for both international and national film productions. The government is providing funding support and aims to push local production volume from the current figure of about 10 to 40 feature films by 2017. In order to revive the box office which fell to 3.2 million admissions in 2008, the Centre Cinématographique Marocain plans to build 150 new screens over the next five years, more than doubling the current screen base.

Sources: African Film and TV Yearbook and Directory, *Variety*, Egypt Film, *Financial Times*, Madga Wassef, Dubai International Film Festival

Middle East

	Israel	Iran	Jordan	Lebanon	United Arab Emirates	Palestinian Territories
Population 2008 (millions) e	7.1	72.9	5.9	3.8	4.8	3.5
GDP per capita 2008 (USD) e	26 536	5 247	3 267	7 376	56 667	~
Gross Box Office 2007 (USD million) e	84.8	~	3.9	12.6	60.2	0.2
Admissions 2007 (milions) e	9.5	8 (1)	0.5	2.1	7.6	0.1
Admissions per capita 2007 e	1.36	0.12 (1)	0.09	0.56	1.69	0.02
Average ticket price 2007 (USD) e	8.96	~	7.80	6.00	8.20	2.00
Screens 2007	380	228	24	86	226	2
Digital Screens June 2008	12	~	~	~	2	~
National Market Share 2007 e	14%	~	~	~	~	~

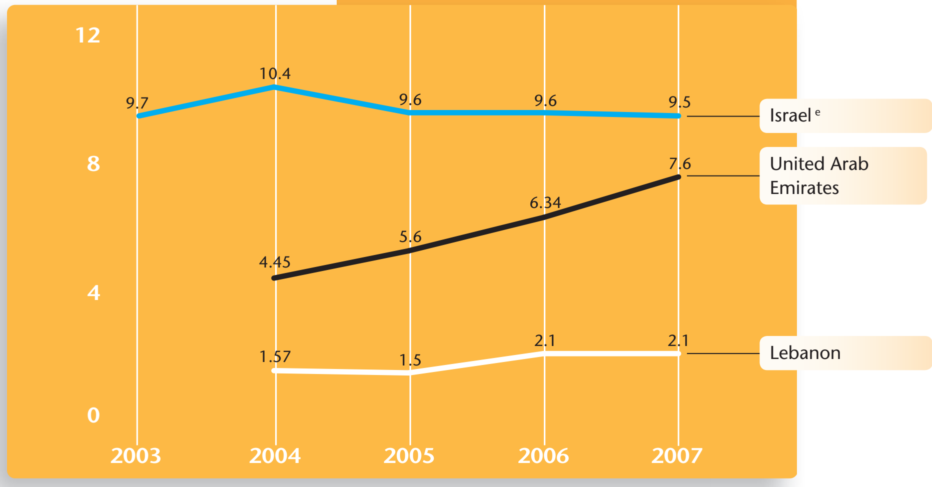
(1) 2002

Sources: Dubai International Film Festival, Screen Digest, Israel Film Fund

Admissions in selected Middle Eastern countries | 2003-2007

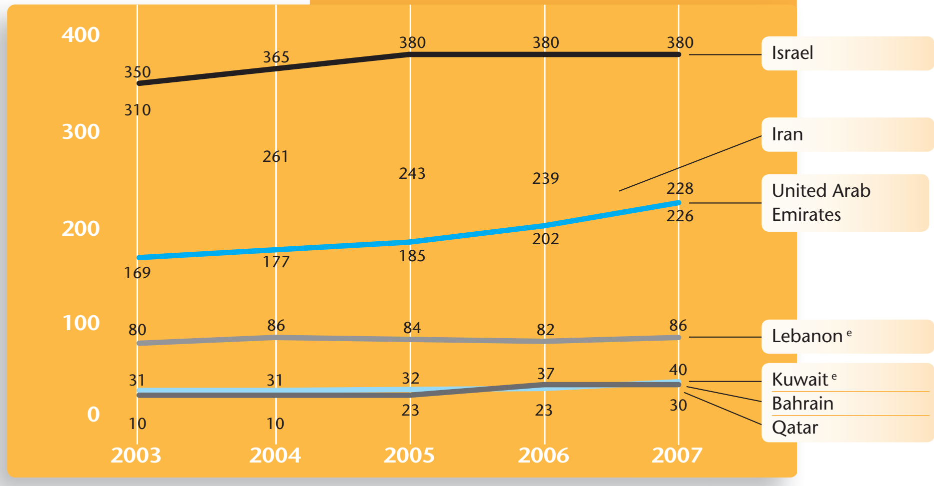
In millions.

Sources: Dubai International Film Festival, Screen Digest, Euromed, CCM, *Les cahiers du cinéma*



Screens in selected Middle Eastern countries | 2003-2007

Sources: Dubai International Film Festival, Screen Digest



Top 10 films by admissions in the United Arab Emirates | 2007

	Original title	Country of origin	Director	Admissions
1	Spider-Man 3	US	Sam Raimi	281 426
2	Pirates of the Caribbean: At World's End	US	Gore Verbinski	207 114
3	Transformers	US	Michael Bay	191 943
4	Rush Hour 3	US	Brett Ratner	185 819
5	Harry Potter and the Order of the Phoenix	GB inc/US	David Yates	181 887
6	Live Free or Die Hard	US/GB	Len Wiseman	181 024
7	300	US	Zack Snyder	177 321
8	Shrek the Third	US	Chris Miller, Raman Hui	172 240
9	Mr. Bean's Holiday	GB/FR/DE/US	Steve Bendelack	161 640
10	The Bourne Ultimatum	US/GB inc/DE	Paul Greengrass	157 188

Sources: Dubai International Film Festival, Circuit Empire

Top 10 films by admissions in Lebanon | 2007

	Original title	Country of origin	Director	Distributor	Admissions
1	Ghannoujet Bayya	LB	~	ITAL	208 657
2	Caramel	LB	Nadine Labaki	SAB	111 484
3	Mr. Bean's Holiday	GB/FR/DE/US	Steve Bendelack	UNI	75 728
4	Morgan Ahmed Morgan	EG	Ali Edreess	FATH	54 581
5	300	US	Zack Snyder	Warner Bros.	46 554
6	Rush Hour 3	US	Brett Ratner	JCS	43 930
7	The Kingdom	US/DE	Peter Berg	UNI	41 524
8	Abu Riad Min Ado	LB	Naser Fakih	SAB	40 568
9	Norbit	US	Brian Robbins	Paramount	38 968
10	Spider-Man 3	US	Sam Raimi	Columbia	38 790

Sources: Dubai International Film Festival, Nielsen EDI

Production

Encouraged by growing markets and available financing, Middle Eastern players are increasingly establishing themselves as major players not only in the Arab but the global film industry. In October 2008 Abu Dhabi launched a multimedia park, called 'twofour54', including production and post-production facilities, which are scheduled to open mid 2009. 'Twofour54' was founded by Middle East production companies Imagenation, C Sky Pictures, Rotana Studios and other partners including the BBC, CNN, and Thomson Reuters. Imagenation Abu Dhabi, a wholly-owned subsidiary of Abu Dhabi Media Company, also closed three major financing deals with Hyde Park (USD 250 million; up to 20 films), Participant Media (USD 250 million, 15-18 films) and National Geographic (USD 100 million, 10-15 films) in 2008. Meanwhile Walt Disney aims to shoot *The Last of the Storytellers*, its first Arabic-language feature film in 2010. In 2008 the Dubai International Film Festival featured for the first time the Dubai Film Market focusing on Arabic, Asian and African films.

Distribution and Exhibition

According to Screen Digest, Middle Eastern box office revenues grew by 13.8% in 2007. Gross box office growth was primarily driven by the steady growth of multiplex cinemas which are charging higher ticket prices. Admissions were estimated to have increased by 7.4% to a total of 19.8 million cinema tickets sold. The United Arab Emirates in particular saw admissions increasing significantly from 4.5 million in 2004 to 7.6 million in 2007. However, this growth is not only due to increasing screen numbers but also to growing admissions per screen which have risen 34% since 2004 to reach 33 717 in 2007. Dubai-based Gulf Film is the leading distributor and exhibitor in the Middle East region with its Grand Cinemas circuit active in UAE, Lebanon, Jordan, Bahrain and Syria, operating a total of 177 screens and the first exhibitor to introduce digital and 3D cinemas in the region. Grand Cinema plans to convert all its 179 screens to digital by 2010. Other key cinema circuits include Kuwait National Cinema Company (Cinescape) and Bahrain Qatar Cinema Company (Cineco).

Sources: Dubai International Film Festival, Screen Digest, *Screen International*

Sources

FOCUS 2009 was prepared by the European Audiovisual Observatory. We would like to thank the following sources:

ANICA	IT	www.anica.it
Audiovisual Information Centre	SK	www.aic.sk
Boxoffice.pl	PL	www.boxoffice.pl
Canadian Film and Television Prod. Assoc. (CFTPA)	CA	www.cftpa.ca
Carlton Screen Advertising (CAA)	IE	www.carltonscreen.ie
Centre national de l'audiovisuel (CNA)	LU	www.cna.public.lu/
Centro Studi ed Analisi di Cinecittà Holding (CCH)	IT	www.cinecitta.com/holding/societa/index.asp?id=15
Centrul National al Cinematografiei (CNC)	RO	www.cncinema.abt.ro/
Cinetel	IT	www.cinetel.it
CMM Intelligence	CN	www.cmmintelligence.com
CNC	FR	www.cnc.fr
Czech Film Center	CZ	www.filmcenter.cz
Danish Film Institute (DFI)	DK	www.dfi.dk
Digital Cinema Media	GB	www.dcm.co.uk
Dubai International Film Festival	AE	www.dubaifilmfest.com
EIREN Motion Picture Association of Japan	JP	www.eiren.org
Estonian Film Foundation (EFSA)	EE	www.efsa.ee
Fachverband der Audiovisions- und Filmindustrie	AT	www.fafo.at
FFA	DE	www.ffa.de
Film og Kino	NO	www.filmweb.no/filmogkino
FilmeB	BR	www.filmeb.com.br
Filmski Sklad Republike Slovenije (FSRS)	SI	www.film-sklad.si
Finnish Film Foundation (FFF)	FI	www.ses.fi
Fundación del Nuevo Cine Latinoamericano	CU	www.cinelatinoamericano.org
Greek Film Center	GR	www.gfc.gr
Hagstofa Islands (HI)	IS	www.statice.is
IBOS Network	IN	www.ibosnetwork.com
ICAA	ES	www.mcu.es/cine/index.html
Instituto do Cinema e do Audiovisual (ICA)	PT	www.ica-ip.pt
Irish Film Board (IFB)	IE	www.irishfilmboard.ie
Korean Film Council (KOFIC)	KR	www.koreanfilm.or.kr
Le film français	FR	www.lefilmfrancais.com
Lietuvos Kinas	LT	www.theatre.lt/liet_kinas.php
MEDIA Salles	IT	www.mediasalles.it
Ministry of Culture	CZ	www.mkcr.cz
Moniteur du film en Belgique (MFB)	BE	
MPAA	US	www.mpaa.org
National Film Center (NFC)	BG	www.nfc.bg
National Film Centre (NFC)	LV	www.nfc.lv
National Film Development Corp. of Malaysia (FINAS)	MY	www.finas.gov.my
National Film Office (NFO)	HU	www.nemzetifilmiroda.hu
Nederlands Fonds voor de Film (NFF)	NL	www.filmfund.nl
NFC (NVB - NVF)	NL	www.nfcstatistiek.nl
Norsk Filminstitutt (NFF)	NO	www.nfi.no
Observatoire de la culture du Québec	CA	www.stat.gouv.qc.ca/observatoire/default.htm
Office fédéral de la statistique (OFS)	CH	www.admin.ch/bfs
Österreichisches Filminstitut (ÖFI)	AT	www.filminstitut.at
Polish Film Institute (PISF)	PL	www.pisf.pl
Russian Film Business Today (RFBT)	RU	www.kinobusiness.com
SARFT	CN	www.sarft.gov.cn
Screen Australia	AU	www.screenaustralia.gov.au
Screen Digest	GB	www.screendigest.com/
Screen Finance (SF)	GB	www.informamedia.com
Screen International	GB	www.screendaily.com
Sinema Gazetesi	TR	
Singapore Film Commission	SG	www.sfc.org.sg
Slovak Film Insitute (SKFI)	SK	www.sfu.sk
SMAIS	IS	www.smais.is
SPIO	DE	www.spio.de
Swedish Film Institute (SFI)	SE	www.sfi.se
Taiwan Cinema	TW	www.taiwancinema.com
UK Film Council (UKFC)	GB	www.ukfilmcouncil.org.uk
Unie Filmovych Distributoru (UFD)	CZ	www.ufd.cz
Variety		www.variety.com