MARCHÉ DU FILM

FOCUS

World Film Market Trends
Tendances du marché mondial du film

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FESTIVAL DE CANNES

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

focus 2014

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Editorial

Once again this year, *FOCUS* will accompany you throughout the Festival and beyond. The publication, which successfully provides information on production and distribution around the world, has become an essential tool for Marché du Film professionals and will help you grasp the ever-changing practices of the film industry.

For this 17th edition of *FOCUS*, I am happy to welcome Susanne Nikoltchev as the new head of the Observatory. The Marché has greatly benefitted from our collaboration and I look forward to working with her and her wonderful team for many more years.

Jérôme Paillard,
Executive Director

À nouveau cette année, *FOCUS* vous accompagnera pendant le Festival et au-delà. Cette publication, qui fournit de précieuses informations sur la production et la distribution à travers le monde, est devenue un outil essentiel pour les professionnels du Marché du Film et vous aidera à comprendre les mutations constantes de l'industrie cinématographique.

Pour cette 17ème édition de *FOCUS*, je suis heureux d'accueillir pour la première fois Susanne Nikoltchev à la tête de l'Observatoire. Le Marché a grandement bénéficié de notre collaboration et je me réjouis de travailler avec elle et son équipe formidable pendant de nombreuses années encore.

Jérôme Paillard
Directeur Délégué

This year I'm delighted to attend the Marché du Film in my new function as Executive Director of the European Audiovisual Observatory. Though this role is still new to me, our provision of information on the audiovisual industry remains unchanged. We continue providing you with our latest intelligence on the film industry thanks to this *FOCUS* publication, our traditional Observatory workshop in Cannes, our Observatory stand on the film market and our contributions to numerous other events.

The Marché du Film is clearly a key event in our annual calendar. We are delighted to keep our "winning team" and to continue our fruitful partnership with the team "Jérôme Paillard". I trust that you enjoy this 17th edition of the *FOCUS* as a fruit of that partnership and as your reference publication on all major world film markets.

Susanne Nikoltchev
Executive Director
European Audiovisual Observatory

Cette année, j'ai le plaisir de participer au Marché du Film en tant que nouvelle Directrice exécutive de l'Observatoire européen de l'audiovisuel. Ce changement ne transformera en rien la manière dont nous vous informons sur le secteur audiovisuel. Comme par le passé, nous diffuserons notre expertise sur l'industrie du cinéma à travers ce numéro de *FOCUS*, à l'occasion de notre traditionnel atelier, par notre stand du Marché du Film, et lors de nombreuses autres manifestations auxquelles nous participons.

Le Marché du Film figure parmi les événements phares du calendrier annuel de l'Observatoire. Je suis convaincue que vous apprécierez cette 17^{e} édition de *FOCUS* – publication de référence sur les grands marchés du film au niveau mondial et fruit de notre partenariat réussi avec Jérôme Paillard et son équipe.

Susanne Nikoltchev
Directrice exécutive
Observatoire européen de l'audiovisuel

The European Audiovisual Observatory, set up in 1992, is a public-service body whose mission is to supply information services (concerning film, television, home video, on demand audiovisual services as well as related public policies) to the audiovisual industry in Europe. The Observatory has 40 member countries, along with the European Union represented by the European Commission. The Observatory is part of the Council of Europe and located in Strasbourg, France. 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 and edits the "FOCUS, World Film Market Trends".

➥ ***http://www.obs.coe.int***

Créé en 1992, l'Observatoire européen de l'audiovisuel est un organisme de service public qui a pour mission de proposer des services d'information au secteur audiovisuel en Europe (concernant le cinéma, la télévision, la vidéo, les services audiovisuels à la demande et les politiques publiques afférentes). Il compte actuellement 40 Etats membres, ainsi que l'Union européenne qui est représentée par la Commission européenne. L'Observatoire fait partie du Conseil de l'Europe et a son siège à Strasbourg en France. Pour accomplir sa mission, il s'appuie sur un réseau de partenaires, de correspondants et d'organisations professionnelles. L'Observatoire propose des informations relatives aux différents marchés audiovisuels, au financement et aux aspects juridiques du secteur ; il édite aussi FOCUS, Tendances du marché mondial du film.

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Volume 1

Television, cinema, video and on-demand audiovisual services – the pan-European picture

Yearbook 2013
Volume 2

FOCUS World Film Market Trends

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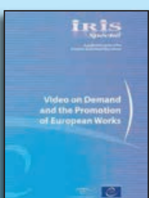

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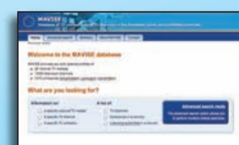

MAVISE database

on television and audiovisual services and companies in Europe

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on film admissions in Europe

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Selected top rankings by admissions | 2008-2013 *prov.*

Cumulative admissions on European markets for the time period 2008 to 2013 as covered in LUMIERE as of April 15, 2014. Coverage of 2013 admissions is only partial. Excluding films released before 2008.

	Country of origin	Prod. Year	Director	Total admissions
5 most recent Palme d'Or winners				
La vie d'Adèle (Blue is the Warmest Colour)	FR/BE/ES	2013	Abdellatif Kechiche	1 569 776
Amour	FR/DE/AT	2012	Michael Haneke	2 312 923
The Tree of Life	US	2011	Terrence Malick	3 636 963
Uncle Boonmee Who Can Recall His Past Lives	TH/FR/GB/DE/ES/NL	2010	A. Weerasethakul	243 272
Das weiße Band	DE/AT/FR/IT	2009	Michael Haneke	2 479 057
5 most recent European Film Awards winners				
La Grande Bellezza	IT/FR	2013	Paolo Sorrentino	1 681 197
Amour	FR/DE/AT	2012	Michael Haneke	2 312 923
Melancholia	DK/SE/FR/DE/IT	2011	Lars von Trier	1 825 597
The Ghost Writer	FR/DE/GB	2010	Roman Polanski	4 942 672
Das weiße Band	DE/AT/FR/IT	2009	Michael Haneke	2 479 057
Top 5 "new EU Member States" based on non-national admissions				
Elles	PL/DE/FR	2011	Malgorzata Szumowska	614 054
Janosik. Prawdziwa historia	PL/SK/CZ	2009	A. Holland, K. Adamik	363 167
The Mill and the Cross	PL/SE	2011	Lech Majewski	209 016
Dupa dealuri	RO/FR/BE	2012	Cristian Mungiu	202 835
Amintiri din epoca de aur	RO/FR	2009	Razvan Marculescu, …	178 718
Top 5 films directed by female director				
Mamma Mia!	US/GB INC/DE	2008	Phyllida Lloyd	34 137 043
The Smurfs	US	2011	Raja Gosnell	20 976 975
Kung Fu Panda 2	US	2011	Jennifer Yuh	19 163 873
Alvin and the Chipmunks: The Squeakquel	US	2009	Betty Thomas	15 371 875
Twilight	US	2008	Catherine Hardwicke	14 852 538
Top 5 European films directed by female director				
The Iron Lady	GB/FR	2011	Phyllida Lloyd	6 213 006
Nanny McPhee and the Big Bang	GB/US/FR	2010	Susanna White	5 879 965
LOL (Laughing Out Loud) ®	FR	2008	Lisa Azuelos	4 087 655
One Day	GB INC/US	2011	Lone Scherfig	3 762 906
Coco avant Chanel	FR	2009	Anne Fontaine	3 754 725
Top 5 European animation films				
Arthur Christmas	GB INC/US	2011	Barry Cook, Sarah Smith	7 979 360
The Pirates! Band of Misfits	GB INC/US	2012	Jeff Newitt, Peter Lord	6 827 311
Sammy's avonturen: De geheime doorgang	BE/US	2010	Ben Stassen	5 898 151
Arthur et la vengeance de Maltazard	FR	2009	Luc Besson	5 660 261
Planet 51	ES/GB	2009	Javier Abad, Jorge Blanco	5 650 056
Top 5 feature documentaries				
This Is It	US	2009	Kenny Ortega	8 786 698
One Direction: This Is Us	US/GB INC	2013	Morgan Spurlock	2 092 222
Pina	DE/FR	2011	Wim Wenders	1 794 169
U2 3D	US	2007	M. Pellington, C. Owens	1 301 696
Sur le chemin de l'école	FR/CN/ZA/BR/CO	2013	Pascal Plisson	1 210 215
Top 5 non-European, non-US films				
Australia	AU/US	2008	Baz Luhrmann	10 854 750
The Great Gatsby	AU/US	2013	Baz Luhrmann	9 166 788
Happy Feet Two	AU	2011	George Miller	5 628 314
Mama	CA/ES	2012	Andrés Muschietti	3 941 626
Zambezia	ZA	2012	Wayne Thornley	2 634 792

Source: OBS, LUMIERE

Minority Report(s)

During last year's Festival, a colleague, a true film professional but nevertheless a *cinéphile* (André Bazin be praised, the two are still compatible!) invited me to have lunch on a terrace in Cannes to give me, as kindly as possible, all his adverse criticism of *FOCUS*. To be more precise, he wanted to tell me that most of the box-office rankings we collect in this publication are stunningly monotonous since they only illustrate the international successes (which are by definition already very well-known) of the same ten blockbusters, in most cases American and, more rarely, European. I could only agree with him: when we do no more than count the big successes, then the "minority" films that make Cannes so diverse – i.e. films produced by the European film industry and film industries in other parts of the world – disappear from view. In a world obsessed by big numbers, their statistical inexistence can quickly be interpreted to mean they do not exist full stop. So it is right and important that these "minority" films also have a statistical existence both as individual works and as works that support "niche markets".

All the studies carried out by the European Audiovisual Observatory in the last few years on various categories of "niche films" (arthouse films, films made in the new EU member states, films produced in the Mediterranean countries, films made in third countries other than the United States, films by women, European animated films, documentaries, children's films, etc) illustrate with dramatic clarity the minority position of these various categories on the European market. For policymakers, institutional leaders, professionals and film lovers who treasure diversity, identifying these minority positions can have a depressing effect. However, statistical indicators are essential for producing a diagnosis and asking the questions that can lead to attempts to find solutions, whether political or professional. Is it normal that films by women in 2010-2012 only made up 17.5% of European film production and 8.7% of admissions of European films in the European Union, even though women represent half the population? Is it normal that in the European Union the market share of European films outside their domestic market fluctuates from year to year between 6.3 and 9.6%? Is it normal that, ten years after EU enlargement, EU admissions of films originating from new Member States constitute on average 1.25% of all EU admissions even though those countries represent 19% of the total EU population? Is it normal that, each year, the market share of films other than American or European productions is just 2 to 3% of EU admissions and that this small share of the cake mainly goes to films from English-speaking countries (Australia, Canada, etc.), thus leaving only a few crumbs of market share to African, Arab, Asian and South American works or to works from European non-EU countries such as Russia or Turkey ? Is it normal that films that receive awards in Cannes or win a European Film Award rarely exceed 2.5 million admissions, i.e. that less than five European citizens per thousand actually see them in a cinema?

In order better to reflect the actual box office success of these categories of films, we provide rankings of the five best successes of these various categories mentioned, as extracted from the LUMIERE database (http://lumiere.obs.coe.int) operated by the Observatory, as well as two rankings of the films that enjoyed the most success in the theatres of the Europa Cinemas network (page 8). The role of this network, which is supported by the European Union's MEDIA programme and brings together 882 cinemas, representing 2 111 screens in 32 European countries, is to promote European diversity by means of a proactive supply policy and measures to activate and educate viewers. The existence of this cinema network benefits not only European films but also independent American works or productions from other parts of the world. The ranking of the films with the best admissions in this network illustrates the existence of a public who are interested in what I shall, briefly, refer to here as "minority films".

It is not the European Audiovisual Observatory's responsibility to offer solutions to market imbalances. In a field that involves major symbolic and aesthetic challenges, historically established economic power relationships and growing demands

Top 20 European films by admissions in Europa Cinemas Network (1) | 2013

	Title	Country of origin (2)	Production Year	Director	Admissions (3)
1	La Grande Bellezza	IT	2013	Paolo Sorrentino	762 883
2	Hannah Arendt	DE	2012	Margarethe Von Trotta	716 695
3	Quartet	GB	2012	Dustin Hoffman	715 304
4	La vie d'Adèle	FR	2013	Abdellatif Kechiche	690 186
5	Night train to Lisbon	EU	2013	Bille August	609 592
6	Los amantes pasajeros	ES	2013	Pedro Almodovar	516 116
7	Amour	FR	2012	Michael Haneke	492 678
8	La migliore offerta	IT	2012	Giuseppe Tornatore	439 766
9	Searching for Sugar Man	SE	2011	Malik Bendjelloul	399 581
10	Le Passé	FR	2013	Asghar Farhadi	390 519
11	Jagten	DK	2012	Thomas Vinterberg	377 210
12	Anna Karenina	GB	2012	Joe Wright	355 566
13	Philomena	GB	2013	Stephen Frears	339 354
14	Renoir	FR	2012	Gilles Bourdos	338 239
15	La Vénus à la fourrure	FR	2013	Roman Polanski	294 034
16	Au bout du conte	FR	2013	Agnès Jaoui	288 002
17	Les Garçons et Guillaume, à table!	FR	2013	Guillaume Gallienne	285 686
18	Paulette	FR	2012	Jérôme Enrico	280 821
19	Jeune & jolie	FR	2013	François Ozon	277 202
20	L'Ecume des jours	FR	2013	Michel Gondry	270 978

(1) Europa Cinemas members in 2013: 32 MEDIA countries, 534 cities, 882 cinemas, 2111 screens.

Source: Europa Cinemas

(2) Country of origin as allocated by Europa Cinemas. May differ from OBS allocation in the rest of the publication.

(2) Does not include admissions from previous years.

Top 20 European films by admissions in Europa Cinemas Network (1) | 2008-2013

	Title	Country of origin (2)	Production Year	Director	Admissions
1	Intouchables	FR	2011	Eric Toledano, Olivier Nakache	3 535 153
2	The King's Speech	GB	2010	Tom Hooper	2 935 671
3	Slumdog Millionaire	GB	2008	Danny Boyle	2 257 682
4	The Artist	FR	2011	Michel Hazanavicius	2 011 943
5	Amour	FR	2012	Michael Haneke	1 392 617
6	Das weisse Band	AT	2009	Michael Haneke	1 364 828
7	Des hommes et des dieux	FR	2010	Xavier Beauvois	1 342 364
8	Carnage	FR	2011	Roman Polanski	1 203 307
9	Soul Kitchen	DE	2009	Fatih Akin	1 166 732
10	Los abrazos rotos	ES	2009	Pedro Almodovar	1 127 602
11	Le concert	FR	2009	Radu Mihaileanu	1 090 829
12	The Iron Lady	GB	2011	Phyllida Lloyd	1 082 440
13	The Reader	GB	2008	Stephen Daldry	980 691
14	Potiche	FR	2010	François Ozon	940 908
15	Habemus Papam	IT	2011	Nanni Moretti	933 495
16	Le Havre	EU	2011	Aki Kaurismäki	919 026
17	The Best Exotic Marigold Hotel	GB	2012	John Madden	917 078
18	You Will Meet a Tall Dark Stranger	GB	2010	Woody Allen	872 250
19	The Ghost Writer	FR	2010	Roman Polanski	845 319
20	The Angels' Share	GB	2012	Ken Loach	830 149

(1) Europa Cinemas members in 2013: 32 MEDIA countries, 534 cities, 882 cinemas, 2111 screens.

Source: Europa Cinemas

(2) Country of origin as allocated by Europa Cinemas. May differ from OBS allocation in the rest of the publication.

with regard to technical quality, the mere mention of a desire for more statistical balance of film success is clearly not an adequate solution but just a mathematical dream. The public do not make a choice based on figures or a sociological or cultural concern for fairness but on the range of productions offered (which is not necessarily wide in all countries and regions), on the actors and actresses they know, on the genres and codes to which they are accustomed, on their knowledge of languages and on recommendations made to them by critics, friends and a large array of marketing tools. Given so many powerful factors, statistics cannot achieve very much, but in an international market like Cannes they can also serve as a promotion tool. Highlighting what films in the minority categories meet with success, even if it is not comparable to that enjoyed by blockbusters, can help to promote the continuation and expansion of the international triumph of the most successful works in these categories.

As every year, we at the European Audiovisual Observatory are grateful to all the correspondents who have enabled us to produce this publication. In particular, we wish to thank a number of new contributors: apart from Europa Cinemas, we have also benefited for the first time from contributions from the European Union's Euromed Audiovisual III programme and the Observatório Iberoamericano do Audiovisual (OIA).

I hope that, like my professional and *cinéphile* friend, you will enjoy these new sets of data as well as the more classical ones.

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Top 10 markets worldwide by gross box office | 2009-2013 [e]

In USD billion. Converted at average annual exchange rates.

Source: OBS, MPAA, Rentrak, IHS

Rank	Market	2009	2010	2011	2012	prov. 2013	Annual growth rate [e] 5 years	1 year
1	US & Canada	10.61	10.58	10.19	10.80	10.90	3.1%	0.9%
2	China	0.91	1.50	2.03	2.74	3.54	55.5%	29.2%
3	Japan	2.20	2.52	2.26	2.45	1.99	1.3%	-18.7%
4	UK	1.48	1.53	1.67	1.74	1.69	1.8%	-2.9%
5	France	1.72	1.74	1.91	1.68	1.66	-0.3%	-1.0%
6	India	1.40	1.35	1.47	1.59	1.59	-3.6%	0.0%
7	South Korea	0.88	1.04	1.11	1.31	1.42	12.6%	8.2%
8	Germany	1.36	1.22	1.33	1.35	1.36	3.8%	0.6%
9	Russian Federation	0.70	1.00	1.16	1.20	1.34	13.6%	11.0%
10	Australia	0.86	1.04	1.13	1.17	1.06	7.1%	-9.0%
World total		29.4	31.6	32.6	34.7	35.9	7.2%	3.5%
Growth rate - World		8.1%	7.5%	3.2%	6.4%	3.5%	7.2%	3.5%
Growth rate - Top 10		5.9%	6.2%	3.2%	7.3%	2.0%	6.2%	2.0%

Top 10 markets worldwide by admissions | 2009-2013 [e]

In million. Ranked by 2013 admissions.

Source: OBS, UNESCO

Rank	Market	2009	2010	2011	2012	prov. 2013	Annual growth rate [e] 5 years	1 year
1	India	2 777	2 706	–	2 641	2 697	-1.0%	2.1%
2	US & Canada	1 415	1 341	1 285	1 358	1 340	-1.4%	-1.3%
3	China	200	290	370	470	612	32.3%	30.2%
4	Mexico	178	190	205	228	248	8.6%	8.8%
5	South Korea	157	147	160	195	213	8.0%	9.5%
6	France	201	207	217	204	194	-1.0%	-4.9%
7	Russian Federation	132	156	160	157	177	7.6%	12.9%
8	UK	173	169	172	173	166	-1.2%	-4.0%
9	Japan	169	174	145	155	156	-2.0%	0.5%
10	Brazil	113	134	144	149	150	7.4%	0.8%
World total [e]		6 949	6 633	7 061	7 656	7 909	3.3%	3.3%
Growth rate - World [e]		-0.8%	-4.5%	6.5%	8.4%	-1.5%	3.3%	3.3%
Growth rate - Top 10 [e]		-5.3%	0.0%	0.9%	3.0%	3.9%	1.9%	3.9%

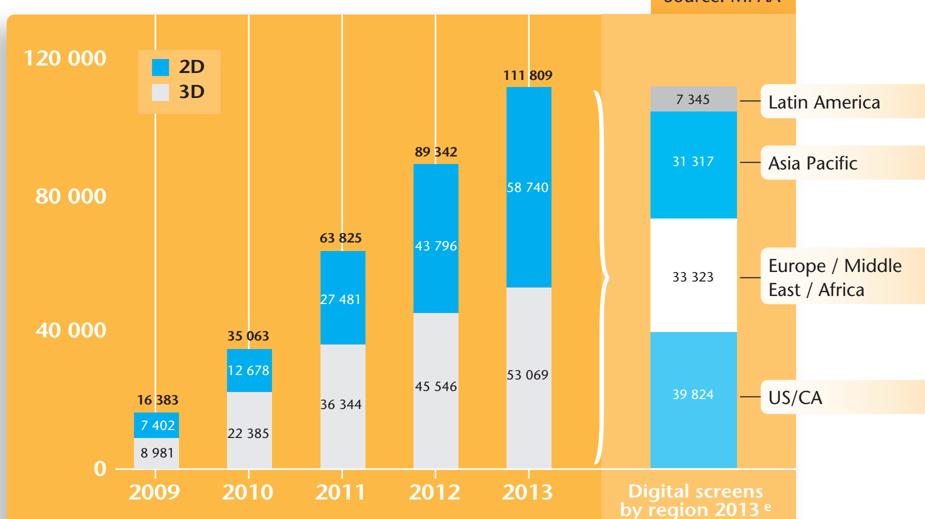
Top 10 markets worldwide by number of screens | 2009-2013 e

Source: OBS, MPAA, IHS

Rank	Market	2009	2010	2011	2012	prov. 2013	Annual growth rate e 5 years	Annual growth rate e 1 year
1	US	39 233	39 547	39 580	39 662	39 783	0.3%	0.3%
2	China	4 723	6 256	9 286	13 118	18 195	40.1%	38.7%
3	India	10 070	10 020	10 020	11 065	11 265	2.8%	1.8%
4	France	5 470	5 478	5 464	5 508	5 587	0.5%	1.4%
5	Mexico	4 480	5 200	5 166	5 360	5 547	5.5%	3.5%
6	Germany	4 734	4 699	4 640	4 617	4 610	-0.7%	-0.2%
7	Spain	4 082	4 080	4 040	3 998	3 894	-1.2%	-2.6%
8	UK	3 651	3 671	3 767	3 817	3 867	1.4%	1.3%
9	Russia	2 101	2 395	2 704	3 100	3 479	13.4%	12.2%
10	Japan	3 396	3 412	3 339	3 290	3 318	-0.6%	0.9%
World total		120 344	122 951	123 740	129 866	134 588	2.8%	3.6%
Growth rate - World e		0.8%	2.2%	0.6%	5.0%	3.6%	2.8%	3.6%
Growth rate - Top 10 e		1.8%	3.4%	3.8%	6.3%	6.4%	5.0%	6.4%
Without China Top 10 e		1.1%	1.7%	0.3%	2.2%	1.2%	1.3%	1.2%

Worldwide number of digital and 3D screens | 2009-2013 e

Source: MPAA



Top 10 markets worldwide by feature film production (1) | 2009-2013 e

In units.

Source: OBS, IHS

Rank	Market	2009	2010	2011	2012	prov. 2013	Annual growth rate e 5 years	1 year
1	India (2)	1 288	1 274	1 255	1 602	~	~	~
2	US (3)	446	490	499	476	455	***0.5%***	***-4.4%***
3	China (4)	456	526	588	745	638	***8.8%***	***-14.4%***
4	Japan (5)	448	408	441	554	591	***7.2%***	***6.7%***
5	France (2)	230	261	272	279	270	***4.1%***	***-3.2%***
6	UK (6)	324	369	341	324	239	***-7.3%***	***-26.2%***
7	Germany (5)	219	193	205	241	236	***1.9%***	***-2.1%***
8	Spain	186	200	199	182	230	***5.5%***	***26.4%***
9	South Korea	138	152	186	204	207	***10.7%***	***1.5%***
10	Italy	131	141	155	166	167	***6.3%***	***0.6%***
World total e		***5 708***	***5 845***	***6 098***	***6 334***	***6 307***	***2.5%***	***-0.4%***
Growth rate - World e		*2.9%*	*2.4%*	*4.3%*	*3.9%*	*-0.4%*	***2.5%***	***-0.4%***
Growth rate - Top 10 e		*1.3%*	*3.8%*	*3.2%*	*15.3%*	*-2.9%*	***4.6%***	***-2.9%***

(1) Country data include minority co-productions.

(2) Films certified.

(3) Production figures shown represent only less than 60% of total production volume as they no longer include films with budgets below USD 1 million. They also do not include feature documentaries or student films.

(4) Does not include films produced outside the GAPPRFT's system of script and final print approval.

(5) Feature films released.

(6) Revised series including films with budgets below GBP 0.5 million.

Top 20 films worldwide by gross box office | 2013

In USD million.

	Original title	Country of origin	Studio	North American box office	International box office	Total
1	Iron Man 3	US/CN	Walt Disney	409	806	1 215
2	Despicable Me 2	US	Universal Pictures	368	553	921
3	The Hunger Games: Catching Fire (1)	US	Lionsgate	398	426	824
4	Furious 6	US/ES	Universal Pictures	239	549	788
5	The Hobbit: The Desolation of Smaug (1)	US/NZ inc	Warner Bros.	209	528	737
6	Monsters University	US	Walt Disney	268	470	739
7	Gravity (1)	US/GB	Warner Bros.	255	415	670
8	Man of Steel	US/CA/GB	Warner Bros.	291	377	668
9	Frozen (1)	US	Walt Disney	272	342	614
10	Thor: The Dark World	US	Walt Disney	203	428	631
11	The Croods	US	20th Century Fox	187	403	590
12	World War Z	US	Paramount	202	337	540
13	Oz the Great and Powerful	US	Walt Disney	235	258	493
14	Star Treck into Darkness	US	Paramount	229	238	467
15	The Wolverine	US/GB	20th Century Fox	133	284	417
16	Pacific Rim	US	Warner Bros.	102	310	412
17	G.I. Joe: Retaliation	US	Paramount	123	250	373
18	The Hangover 3	US	Warner Bros.	112	250	362
19	The Smurfs 2	US	Sony	71	277	348
20	A Good Day to Die Hard	US	20th Century Fox	67	239	306

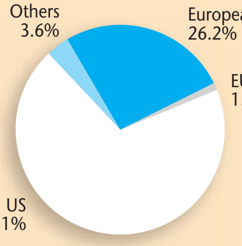
(1) Still in release in 2014. The figures in the table only include the 2013 GBO.

Source: *Variety*, OBS

European Union

Population 2013 e	506 million
GDP per capita 2013 e	34 354 USD
Gross box office 2013 e	6.29 bn EUR (8.35 bn USD)
Admissions 2013 e	907.1 million
Average ticket price 2013 e	6.9 EUR (9.2 USD)
Average admissions per capita 2013 e	1.8
Screens 2012 I 2013 e	29 950 I 29 958
Digital screens 2012 I 2013 e	21 645 I 26 035
Digital 3D screens 2012 I 2013 e	11 638 I 13 136

Market shares 2013 e



GBO hike is over

EU gross box office declined in 2013 for the first time since 2005. GBO takings in the 28 EU Member States fell to an estimated EUR 6.29 billion, a 4.3% drop compared to 2012's record high of EUR 6.57 billion. In the past five years GBO growth has been primarily fuelled by increasing ticket prices which kept box office growing despite falling admissions. This was no longer the case in 2013 when the average ticket price in the EU decreased for the first time since Avatar kick-started digital conversion in 2009 by 0.3% to EUR 6.9. While the novelty factor of digital 3D blockbusters initially boosted underlying cinema attendance to 982 million in 2009, admissions have been decreasing more or less continuously since then. First they dropped to around 965 million in 2010 and 2011 before falling in a more pronounced manner to 946 million in 2012 and ultimately 907.1 million in 2013, the lowest level since 2005.

Admissions decreased in 20 out of the 28 EU Member States with only Italy registering a significant year-on-year increase in cinema attendance (+6.6 million). The overall drop in EU admissions was primarily caused by declining markets in Spain (-15.4 million), France (-10.0 million), the UK (-7 million) and Germany (-5.4 million).

Market share for European films down

Based on provisional figures, estimated market share for European films in the EU dropped from 28.9% to 26.2% in 2013. This figure excludes European films produced in Europe with incoming US investment which - in the absence of runaway successes like *Skyfall* or the *Harry Potter* franchise - registered their weakest market share in recent history taking just over 1% of total admissions. Market share for US films on the other hand increased from 62.8% to an estimated 69.1%, the highest market share in the past ten years.

The European charts were topped by *Despicable Me 2* and the second instalment of *The Hobbit* franchise selling 25.4 and 23.3 million tickets respectively. *Les Misérables* and Italian runaway success *Sole a catinelle* were the only two European films to make it into the 20 top grossing films in 2013.

EU production levels keep growing

EU production levels continued to grow, albeit in a moderate manner, to an estimated 1 546 feature films in 2013, 18 films more than in 2012. This represents yet another record high and breaks down into an estimated 1 075 feature fiction films and 471 feature documentaries. Fiction films therefore accounted for about 70% of total film output. Growth was however driven primarily by an increasing number in feature documentaries, up 15 films, as the production of EU fiction films has remained stable over the past four years.

87% of EU screens converted to digital

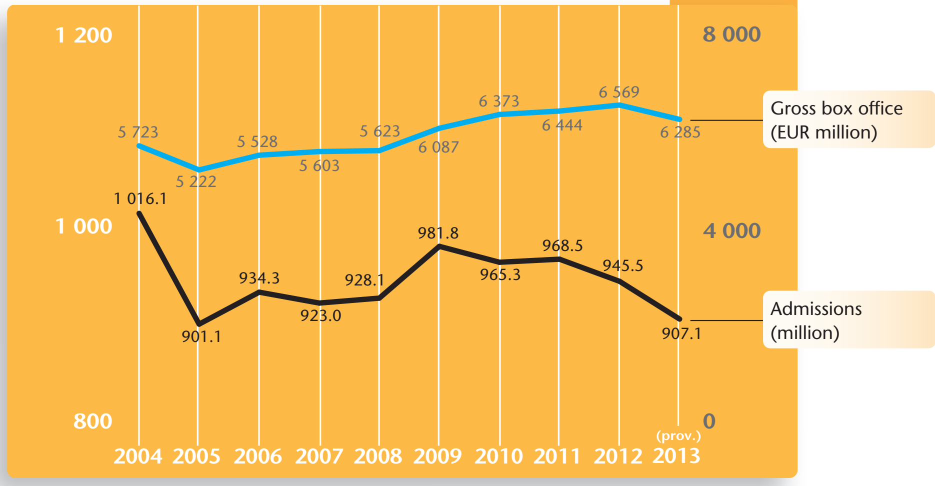
According to figures provided by MEDIA Salles a total of 4 390 screens were converted to digital projection systems in 2013, bringing the total to 26 035 digital screens. This means that by the end of 2013 about 87% of the EU's total screen base has been digitised. A total of 10 EU Member States including France and the UK have converted practically all their screens. Only 7 Member States registered digital screen penetration rates below 70%, including the Czech Republic (51%), Slovenia (45%) and Greece (27%).

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 or SXRD technology.

Admissions and gross box office in the European Union (1) | 2004-2013 e

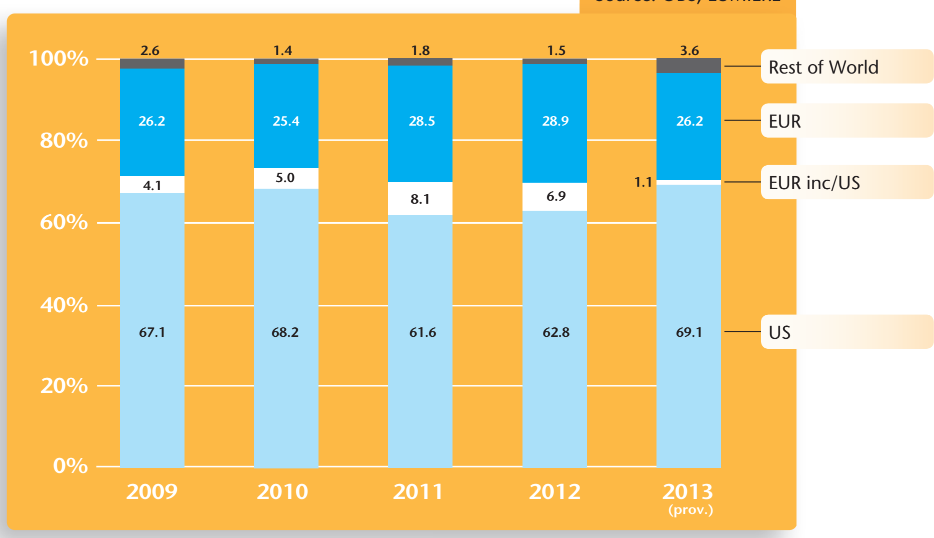
Source: OBS



(1) Pro-forma figures for 28 EU Member States. National currencies converted at average annual exchange rates.

Breakdown of European Union admissions by nationality films | 2009-2013 e

Source: OBS, LUMIERE



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

Number of feature films produced in the European Union | 2009-2013

Country		2009	2010	2011	2012	2013	Sources
Austria (2)	100% national fiction	7	10	14	9	18	OFI
	maj. co-prod. fiction	5	4	6	6	5	OFI
	min. co-prod. fiction	5	6	15	8	2	OFI
	Feature documentaries	17	24	16	31	21	OFI
Belgium (1)	100% national fiction	4	2	5	6	13	FWB/ VAF
	maj. co-prod. fiction	13	16	12	14	17	FWB/ VAF
	min. co-prod. fiction	21	24	21	27	34	FWB/ VAF
	Feature documentaries	5	4	4	8	6	FWB/ VAF
Bulgaria (2)	100% national fiction	11	6	6	5	0	NFC
	maj. co-prod. fiction	0	1	2	1	4	NFC
	min. co-prod. fiction	4	3	1	2	0	NFC
	Feature documentaries	10	5	6	11	11	NFC
Cyprus e	100% national fiction	0	1	0	0	0	PIO/Min.Ed & Cult./ OBS
	maj. co-prod. fiction	1	0	2	1	0	PIO/Min.Ed & Cult./ OBS
	min. co-prod. fiction	0	1	0	0	1	PIO/Min.Ed & Cult./ OBS
	Feature documentaries	2	0	0	1	0	PIO/Min.Ed & Cult./ OBS
Croatia (2)	100% national fiction	6	5	8	10	14	HAC
	maj. co-prod. fiction	5	4	2	4	2	HAC
	min. co-prod. fiction	2	2	10	4	8	HAC
Czech Republic (2)	100% national fiction	21	16	21	23	19	SFK
	maj. co-prod. fiction	8	4	4	5	8	SFK
	min. co-prod. fiction	4	5	0	4	2	SFK
	Feature documentaries	12	15	20	15	18	SFK
Denmark (2)	100% national fiction	11	16	16	12	13	DFI
	maj. co-prod. fiction	9	7	3	6	9	DFI
	min. co-prod. fiction	6	7	6	9	9	DFI
	Feature documentaries	23	30	37	27	33	DFI
Estonia (2)	100% national fiction	2	0	4	5	4	EFSA
	maj. co-prod. fiction	1	3	3	0	3	EFSA
	min. co-prod. fiction	3	1	0	6	0	EFSA
	Feature documentaries	9	19	14	9	13	EFSA
Finland	100% national fiction	12	12	15	20	14	FFF
	maj. co-prod. fiction	4	2	5	4	5	FFF
	min. co-prod. fiction	4	5	7	4	6	FFF
	Feature documentaries	5	13	8	16	18	FFF
France	100% national	137	143	152	150	154	CNC
	maj. co-prod.	45	60	55	59	55	CNC
	min. co-prod.	48	58	65	70	61	CNC
Germany (2)	100% national fiction	87	61	63	86	79	SPIO
	maj. co-prod. fiction	42	23	29	32	38	SPIO
	min. co-prod. fiction	20	35	31	36	37	SPIO
	Feature documentaries	70	74	82	87	82	SPIO
Greece (2)	100% national fiction	20	16	25	25	24	GFC
	maj. co-prod. fiction	5	1	2	4	14	GFC
	min. co-prod. fiction	0	1	1	3	2	GFC
Hungary (2)	100 % national	22	26	38	26	27	NFO
	maj. co-prod.	1	1	2	0	2	NFO
	min. co-prod.	4	9	4	1	3	NFO
Ireland	100% national fiction	8	4	4	4	4	IFB
	maj. co-prod. fiction	6	10	9	9	9	IFB
	min. co-prod. fiction	6	9	4	10	6	IFB
	Feature documentaries	13	15	15	16	15	IFB
Italy	100 % national	97	114	132	129	138	MiBAC
	maj. co-prod.	17	14	14	21	18	MiBAC
	min. co-prod	17	13	9	16	11	MiBAC

Continued

Number of feature films produced in the European Union | 2009-2013

Country		2009	2010	2011	2012	2013	Sources
Latvia (2) e	100% national fiction	3	2	4	2	2	NFCL
	maj. co-prod. fiction	1	1	0	3	0	NFCL
	min. co-prod. fiction	0	0	1	1	2	NFCL
	Feature documentaries	14	16	11	10	4	NFCL/Baltic Films/OBS
Lithuania (2) e	100% national fiction	6	4	2	3	7	LKC/Baltic Films
	maj. co-prod. fiction	1	1	0	1	1	LKC/Baltic Films
	min. co-prod. fiction	0	0	0	0	2	LKC/Baltic Films
	Feature documentaries	3	6	9	5	6	LKC/Baltic Films/OBS
Netherlands	100% national fiction	28	22	28	26	19	NFF/NVF/OBS
	maj. co-prod. fiction	6	10	11	17	17	NFF/NVF/OBS
	min. co-prod. fiction	6	15	16	12	13	NFF/NVF/OBS
	Feature documentaries	11	15	21	23	16	NFF/NVF/OBS
Poland	100% national fiction	31	38	24	28	19	PISF/Min. Cult./OBS
	maj. co-prod. fiction	7	4	3	4	3	PISF/Min. Cult./OBS
	min. co-prod. fiction	4	2	8	10	3	PISF/Min. Cult./OBS
	Feature documentaries	7	2	9	5	6	PISF/Min. Cult./OBS
Portugal	100% national fiction	9	9	9	3	2	ICA
	maj. co-prod. fiction	3	6	5	4	1	ICA
	min. co-prod. fiction	2	4	5	1	5	ICA
	Feature documentaries	9	11	11	7	5	ICA
Romania	100% national fiction	11	9	9	10	16	CNC
	maj. co-prod. fiction	3	8	2	8	7	CNC
	min. co-prod. fiction	4	2	1	2	3	CNC
	Feature documentaries	33	21	15	18	11	CNC/OBS
Slovakia	100% national fiction	1	1	2	7	3	SFI
	maj. co-prod. fiction	5	1	3	1	4	SFI
	min. co-prod. fiction	7	2	3	0	0	SFI
	Feature documentaries	5	4	4	9	6	SFI
Slovenia (2) (3)	100% national fiction	3	4	2	2	9	SFC
	maj. co-prod. fiction	0	0	4	2	1	SFC
	min. co-prod. fiction	1	3	2	4	2	SFC
	Feature documentaries	2	0	0	2	4	SFC
Spain	100 % national	135	151	151	126	134	ICAA
	maj. co-prod.	20	34	29	31	58	ICAA
	min. co-prod.	31	15	19	25	38	ICAA
Sweden (2)	100% national fiction	18	20	16	27	34	SFI
	maj. co-prod. fiction	14	10	7	3	1	SFI
	min. co-prod. fiction	5	8	5	8	8	SFI
	Feature documentaries	10	16	15	13	18	SFI
United Kingdom (4)	100 % national	258	303	264	242	166	BFI
	maj. co-prod.	12	25	22	24	18	BFI
	min. co-prod.	26	11	24	21	18	BFI
	Inward features (5)	28	30	31	37	37	BFI
Total fiction films EU 28 e (6)		***1 024***	***1 074***	***1 071***	***1 072***	***1 075***	OBS
Total feature documentaries EU 28 e (6) (7)		***405***	***434***	***452***	***456***	***471***	OBS
Total feature films EU 28 e (6) (7)		***1 429***	***1 508***	***1 523***	***1 528***	***1 546***	OBS

(1) FWB counts films certified. VAF counts only feature films released which received public support.

(2) Films on first release.

(3) 2009 to 2012 data include only data on films receiving national support.

(4) In contrast to previous years UK figures include feature films with budgets below GBP 500 000.

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

(6) Restated pro-forma data series.

(7) May double count minority co-produced feature documentaries. No comprehensive data for feature documentaries available for CY, GR, HU, LT, MT.

Admissions in the European Union | 2009-2013

In million.

Country	2009	2010	2011	2012	prov. 2013	2013/12	Sources
Austria	18.1	16.5	15.8	16.4	15.2	*-7.5%*	OBS/ÖFI
Belgium [e]	21.3	22.3	22.8	21.9	20.9	*-4.3%*	FCB/CCA-FWB
Bulgaria	3.2	4.0	4.7	4.1	4.8	*16.7%*	National Film Center
Croatia	3.5	3.4	3.6	4.1	4.0	*-1.6%*	HAC
Cyprus	0.9	0.9	0.9	0.8	0.6	*-24.4%*	Min. Edu. & Cult./ Media Salles
Czech Republic	12.5	13.5	10.8	11.2	11.1	*-1.1%*	Státní fond kinematografie/UFD
Denmark	14.1	13.0	12.4	13.6	13.6	*-0.2%*	Danish Film Institute
Estonia	1.8	2.1	2.5	2.6	2.6	*-1.1%*	Estonian Film Foundation
Finland	6.8	7.6	7.1	8.4	7.8	*-6.9%*	Finnish Film Foundation
France	201.4	207.0	217.1	203.6	193.6	*-4.9%*	CNC
Germany	146.3	126.6	129.6	135.1	129.7	*-4.0%*	FFA
Greece	12.3	11.7	10.8	10.1	9.2	*-9.0%*	GFC/Media Salles/OBS
Hungary [e]	10.6	11.0	9.8	9.5	10.1	*6,8%*	National Film Office
Ireland	17.7	16.5	16.3	15.4	14.7	*-5,0%*	Carlton Screen Advertising
Italy [e]	109.2	120.6	112.1	100.1	106.7	*6,6%*	Cinetel/SIAE/OBS
Latvia	1.9	2.1	2.1	2.3	2.4	*4.0%*	National Film Centre
Lithuania	2.8	2.5	3.0	3.0	3.3	*7,8%*	Lithuanian Film Centre
Luxembourg	1.3	1.2	1.3	1.3	1.2	*-3,4%*	CNA/Media Salles
Malta [e]	0.9	0.9	0.8	0.7	0.7	*-6.9%*	Media Salles
Netherlands	27.3	28.2	30.4	30.6	30.8	*0.8%*	MaccsBox - NVB & NVF
Poland	39.2	37.5	38.7	38.5	36.3	*-5.6%*	PISF/Boxoffice.pl
Portugal	15.7	16.6	15.7	13.8	12.5	*-9.2%*	Instituto do Cinema e do Audiovisual
Romania	5.3	6.5	7.2	8.3	9.0	*8.4%*	Centrul National al Cinematografiei
Slovakia	4.1	3.9	3.6	3.4	3.7	*8,4%*	Slovak Film Institute
Slovenia	2.7	2.9	2.9	2.7	2.3	*-14.8%*	Slovenian Film Fund
Spain	110.0	101.6	98.3	93.6	78.2	*-16.4%*	ICAA
Sweden	17.5	15.8	16.5	17.9	16.6	*-7.5%*	Swedish Film Institute
United Kingdom	173.5	169.2	171.6	172.5	165.5	*-4.0%*	BFI, DCM/CAA
EU 28 - Total [e]	***982***	***965***	***968***	***946***	***907***	*-4.1%*	European Audiovisual Observatory

Source: OBS

The tables below offer provisional rankings based on the analysis of data from 23 EU member states representing 88% of all admissions in the EU.

Top 25 films by admissions in the European Union | 2013 *prov.*

	Original title	Country of origin	Year	Director	*prov.* Admissions
1	Despicable Me 2	US	2013	P. Coffin, C. Renaud	25 417 628
2	The Hobbit: The Desolation of Smaug	US/NZ inc	2013	Peter Jackson	23 324 741
3	Iron Man 3	US/CN	2013	Shane Black	19 591 885
4	Frozen	US	2013	Chris Buck, Jennifer Lee	18 594 751
5	The Hunger Games: Catching Fire	US	2013	Francis Lawrence	18 587 831
6	Django Unchained	US	2012	Quentin Tarantino	18 196 588
7	Furious 6	US/ES	2013	Justin Lin	17 602 865
8	The Croods	US	2013	C. Sanders, K. de Micco	16 355 048
9	Monsters University	US	2013	Dan Scanlon	14 609 047
10	The Hangover Part III	US	2013	Todd Phillips	13 819 012
11	Gravity	US/GB inc	2013	Alfonso Cuarón	13 541 742
12	The Smurfs 2	US	2013	Raja Gosnell	12 546 151
13	World War Z	US	2013	Marc Forster	11 204 785
14	Thor: The Dark World	US	2013	Alan Taylor	10 669 475
15	Now You See Me	US	2013	Louis Leterrier	10 453 244
16	Man of Steel	US/CA/GB	2013	Zack Snyder	10 297 252
17	The Hobbit: An Unexpected Journey (1)	US/NZ inc	2012	Peter Jackson	9 439 640
18	Les Misérables (2)	GB/US	2012	Tom Hooper	8 971 233
19	The Great Gatsby	AU/US	2013	Baz Luhrmann	8 940 959
20	Turbo	US	2013	David Soren	8 725 307
21	Sole a catinelle	IT	2013	Gennaro Nunziante	8 005 352
22	Oz the Great and Powerful	US	2013	Sam Raimi	7 981 323
23	Star Trek: Into Darkness	US	2013	J.J. Abrams	7 727 164
24	A Good Day to Die Hard	US	2013	John Moore	7 595 478
25	The Wolverine	US/GB	2013	James Mangold	7 490 826

(1) 24 476 474 admissions in the EU in 2012. (2) 477 172 admissions in the EU in 2012. Source: OBS, LUMIERE

Top 25 European Union films by admissions in the European Union | 2013 *prov.*

	Original title	Country of origin	Year	Director	*prov.* Admissions
1	Les Misérables (1)	GB/US	2012	Tom Hooper	8 971 233
2	Sole a catinelle	IT	2013	Gennaro Nunziante	8 005 352
3	Fack ju Göhte	DE	2013	Bora Dagtekin	5 976 948
4	Rush	GB inc/US/DE	2013	Ron Howard	4 705 321
5	Lo imposible (2)	ES	2012	Juan Antonio Bayona	4 312 437
6	Les profs	FR	2013	Pierre-François Martin-Laval	3 955 113
7	Kokowääh 2	DE	2013	T. Künstler, T. Schweiger	2 962 634
8	Schlussmacher	DE	2013	M. Schweighöfer, T. Künstler	2 746 290
9	Quartet	GB	2012	Dustin Hoffman	2 526 450
10	I Give It a Year	GB/FR/DE	2013	Dan Mazer	2 451 975
11	Il principe abusivo	IT	2013	Alessandro Siani	2 380 475
12	Philomena	GB/US/FR	2013	Stephen Frears	2 191 371
13	About Time	GB	2013	Richard Curtis	2 177 798
14	La cage dorée	FR	2013	Ruben Alves	2 020 219
15	Boule & Bill	FR/BE/LU	2013	F. Magnier, A. Charlot	2 013 591
16	9 mois ferme	FR	2013	Albert Dupontel	1 997 074
17	Los amantes pasajeros	ES	2013	Pedro Almodóvar	1 962 962
18	Les garçons et Guillaume, à table !	FR/BE	2013	Guillaume Gallienne	1 944 280
19	Eyjafjallajökull	FR	2013	Alexandre Coffre	1 931 073
20	Jappeloup	FR/CA	2013	Christian Duguay	1 820 340
21	Paulette	FR	2012	Jérôme Enrico	1 736 910
22	La migliore offerta	IT	2013	Giuseppe Tornatore	1 718 764
23	La grande bellezza	IT/FR	2013	Paolo Sorrentino	1 677 730
24	Les gamins	FR	2013	Anthony Marciano	1 675 023
25	Cloud Atlas (3)	DE/US	2012	T. Tykwer, A. Wachowski	1 586 564

(1) 477 172 admissions in the EU in 2012. (2) 6 563 485 admissions in the EU in 2012. (3) 4 925 911 admissions in the EU in 2012.

Note: 'inc' refers to films produced in Europe with US incoming investment. Source: OBS, LUMIERE

Top 25 EU films by admissions in North America | 2013 e

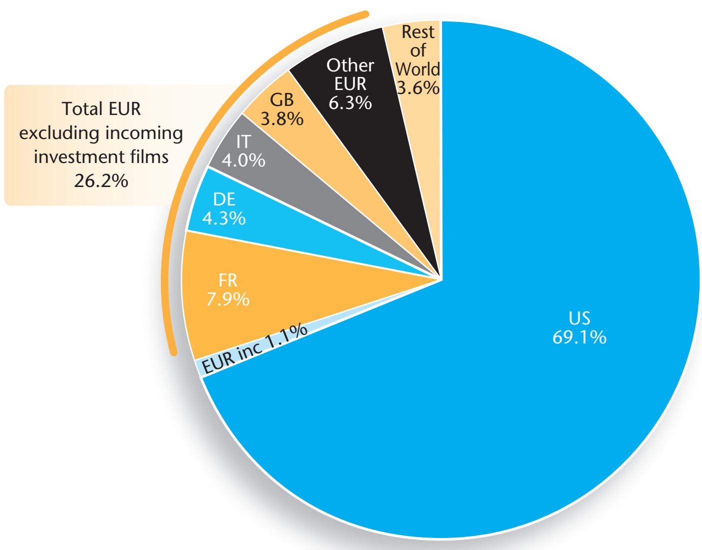
Admissions estimated based on average ticket price of 8.13 USD.

	Original title	Country of origin	Year	Director	Admissions e
1	Les Misérables	GB/US	2012	Tom Hooper	9 323 759
2	Rush	GB inc/US/DE	2013	Ron Howard	3 312 827
3	The World's End	GB/US/JP	2013	Edgar Wright	3 196 926
4	Lo imposible	ES	2012	Juan Antonio Bayona	2 273 215
5	Quartet	GB	2012	Dustin Hoffman	2 260 803
6	Philomena	GB/US/FR	2013	Stephen Frears	2 195 916
7	About Time	GB	2013	Richard Curtis	1 883 735
8	Skyfall	GB inc/US	2012	Sam Mendes	1 654 224
9	Amour	FR/DE/AT	2012	Michael Haneke	799 482
10	Mandela: Long Walk to Freedom	GB/ZA	2013	Justin Chadwick	710 749
11	Closed Circuit	GB/US	2013	John Crowley	706 930
12	Hyde Park on Hudson	GB inc/US	2012	Roger Michell	551 520
13	Trance	GB inc/US/FR	2013	Danny Boyle	285 111
14	Renoir	FR	2012	Gilles Bourdos	281 990
15	The Christmas Candle	GB/US	2013	John Stephenson	277 331
16	La vie d'Adèle	FR/BE/ES	2013	Abdellatif Kechiche	247 576
17	Anna Karenina	GB	2012	Joe Wright	244 810
18	The Attack	FR/BE/IL	2012	Ziad Doueiri	211 489
19	Stoker	GB/US	2013	Chan-wook Park	209 375
20	Unfinished Song	GB/DE	2012	Paul Andrew Williams	209 319
21	Love Is All You Need	DK/SE/FR/DE/IT	2012	Susanne Bier	200 595
22	Flying Monsters 3D with David Attenborough	GB	2011	Matthew Dyas	187 969
23	De rouille et d'os	FR/BE	2012	Jacques Audiard	177 098
24	Los amantes pasajeros	ES	2013	Pedro Almodóvar	168 191
25	Romeo and Juliet	GB/IT/CH	2013	Carlo Carlei	142 929

Note: Based on Top 250 films in the United States and Canada. 'Inc' refers to films produced in Europe with US incoming investment. A total of 29 EU films featured in the top 250 in 2013, generating cumulative admissions of 32.2 million (2.4% market share).

Source: *Variety*, OBS, LUMIERE

Breakdown of European Union admissions by nationality of films | 2013 *prov.*

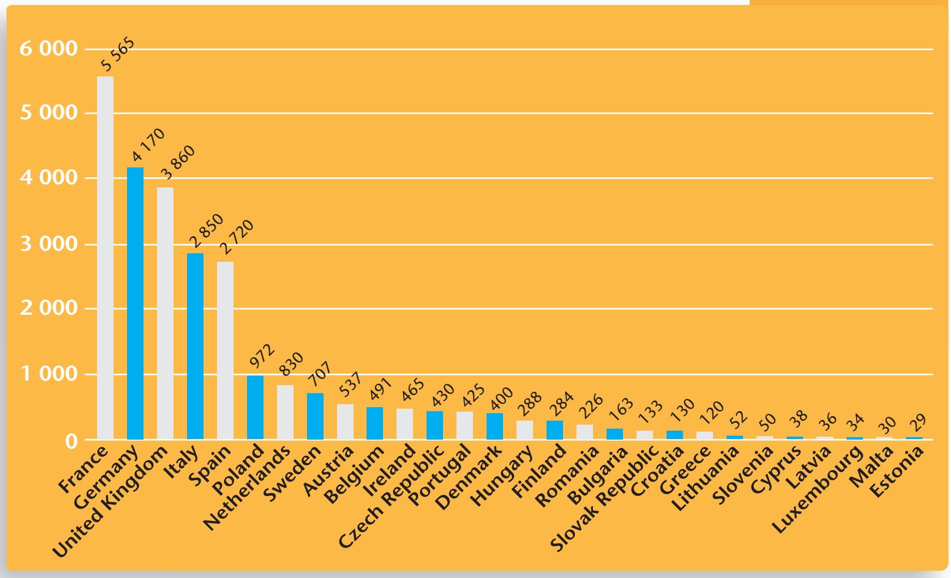


Note: 'inc' refers to films produced in Europe with US incoming investment.

Source: OBS, LUMIERE

Number of digital screens in the European Union by country | December 2013

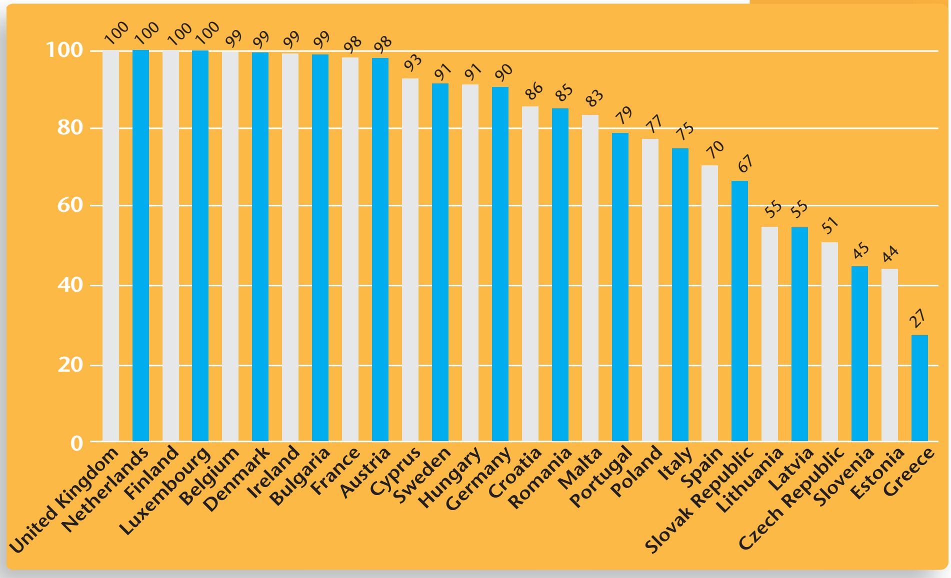
Source: MEDIA Salles



Digital screen penetration in the European Union by country | December 2013 [e]

In %.

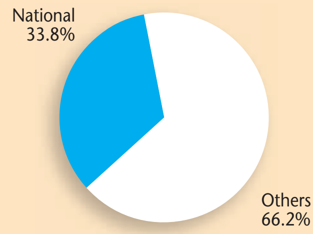
Source: MEDIA Salles



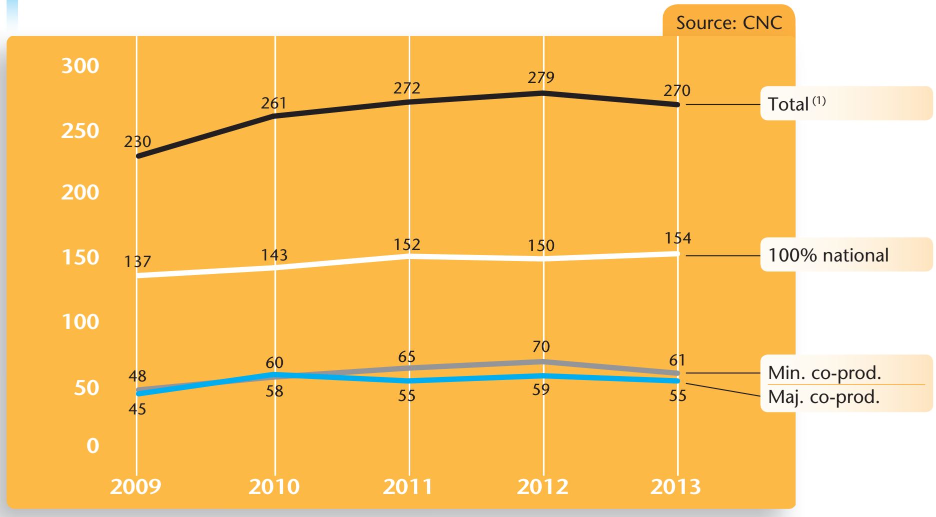
France

Population 2013 [e]	65.6 million
GDP per capita 2013 [e]	42 991 USD
Gross box office 2013	1.25 bn EUR (1.66 bn USD)
Admissions 2013	193.6 million
Average ticket price 2013	6.5 EUR (8.6 USD)
Average admissions per capita 2013	2.9
Screens 2012 I 2013	5 508 I 5 587
Digital screens 2012 I 2013	5 150 I 5 565
Digital 3D screens 2012 I 2013	2 851 I 2 970

Market shares 2013

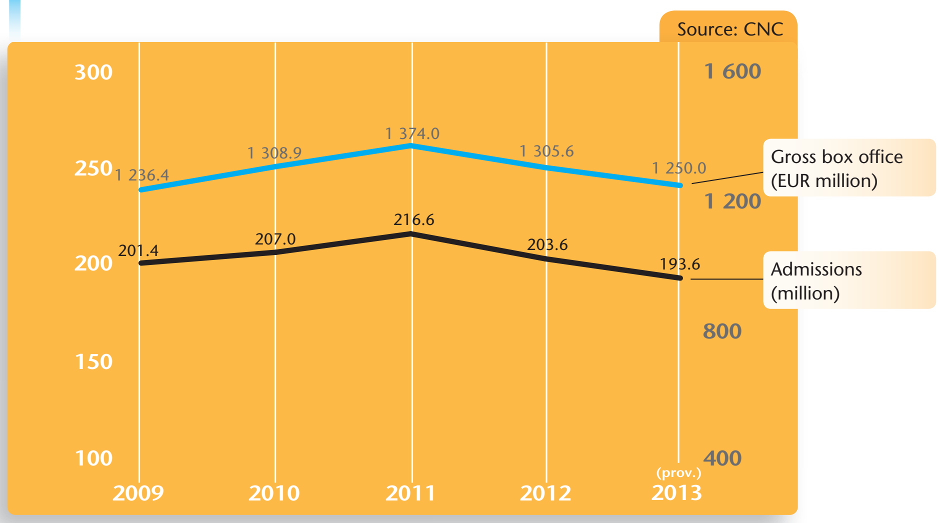


Number of French feature films produced I 2009-2013



(1) Officially recognised films.

Admissions and gross box office I 2009-2013



Top 20 films by admissions in France | 2013

	Original title	Country of origin	Director	Distributor	Admissions
1	Despicable Me 2	US	P. Coffin, C. Renaud	Universal Pictures	4 655 036
2	Iron Man 3	US/CN	Shane Black	Walt Disney Studios	4 386 028
3	Django Unchained	US	Quentin Tarantino	Sony Pictures Releasing	4 303 569
4	Gravity	US/GB inc	Alfonso Cuarón	Warner Bros.	4 045 339
5	Les profs	FR	P-F Martin-Laval	UGC Distribution	3 955 113
6	Now You See Me	US	Louis Leterrier	SND Films	3 010 483
7	Furious 6	US/ES	Justin Lin	Universal Pictures	2 992 586
8	Frozen	US	C. Buck, J. Lee	Walt Disney Studios	2 719 316
9	The Hobbit: The Desolation of Smaug	US/NZ inc	Peter Jackson	Warner Bros.	2 705 290
10	The Hunger Games: Catching Fire	US	Francis Lawrence	Metropolitan Filmexport	2 639 671
11	World War Z	US	Marc Forster	Paramount Pictures	2 458 104
12	Turbo	US	David Soren	20th Century Fox	2 432 623
13	The Croods	US	C. Sanders, K. Micco	20th Century Fox	2 377 680
14	Man of Steel	US/CA/GB	Zack Snyder	Warner Bros.	2 318 189
15	Thor: The Dark World	US	Alan Taylor	Walt Disney Studios	2 306 445
16	The Smurfs 2	US	Raja Gosnell	Sony Pictures Releasing	2 263 030
17	The Hobbit: An Unexpected Journey	US/NZ inc	Peter Jackson	Warner Bros.	2 209 342
18	Monsters University	US	Dan Scanlon	Walt Disney Studios	2 133 524
19	Boule & Bill	FR/BE/LU	F. Magnier, A. Charlot	StudioCanal	2 006 408
20	9 mois ferme	FR	Albert Dupontel	Wild Bunch Distribution	1 997 074

Source: *Le film français*

Distribution and exhibition

2013 proved to be a challenging year for French cinema. Admissions declined by over 10 million to 193.6 million (-4.9%), GBO decreased by EUR 16 million to EUR 1.25 billion and the market share of French films dropped to 33.8%, the lowest level since 1999 while US film took around 53%, the highest level in over a decade. As noted by the CNC, 2013 was characterized by the absence of a really big hit. For the first time in over ten years no one single film sold more than 5 million tickets. The National Federation of French Cinemas blamed the film offering not meeting audience expectations, economic pressure and a resurgence of piracy as possible causes for the market decline.

Bad news also came from UniFrance which reported international admissions for French films plummeting by 65.3% to 50 million. This compares with 140 million admissions in 2012, achieved largely through the international success of *Intouchables*, *Taken 2* and *The Artist*. A deal between the Ministry of Culture and exhibitors to lower ticket prices for children under 14 to EUR 4 was met with initial skepticism but appears to have become a success story with admissions in that age group jumping to 3 million in January and February 2014, 2.5 million more than in the same period in previous years.

Production and funding

With 270 feature films approved in 2013, France remains the most prolific film production country in Europe along with the UK. Total production investment however declined by 6.5% from EUR 1.34 billion to EUR 1.25 billion according to figures published by the CNC. Possibly in reaction to the box office decline and declining investments from broadcasters as well as softened DVD and VOD markets, the average production budget for French initiative films continued to fall by 4.3% to EUR 4.88 million, the lowest level in 11 years. The median budget even dropped by 22.5% from EUR 3.2 million to EUR 2.5 million, illustrating the strong increase in low budget productions.

Producers fear that a newly introduced collective labour agreement for crew could inflate production costs which were already considered to be too high. It was argued that this could have a particular effect on low and medium budget films.

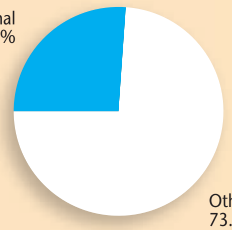
All these issues related to production financing and distribution of theatrical works in a digital world were analysed in a report by René Bonnell which was published in January 2014. The report also presents suggestions on how to address the current challenges faced by French cinema.

Source: CNC, *Le Film Francais, Screen International,* FNCF, MEDIA Salles

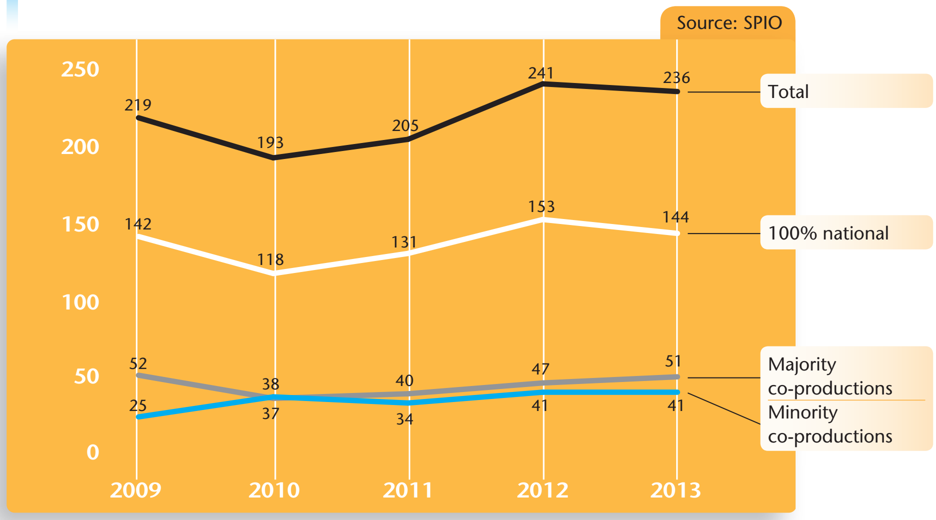
Germany

Population 2013 e	80.5 million
GDP per capita 2013 e	43 952 USD
Gross box office 2013	1.02 bn EUR (1.36 bn USD)
Admissions 2013	129.7 million
Average ticket price 2013	7.9 EUR (10.5 USD)
Average admissions per capita 2013	1.6
Screens 2012 I 2013	4 617 I 4 610
Digital screens 2012 I 2013	3 134 I 4 170
Digital 3D screens 2012 I 2013	1 686 I 1 985

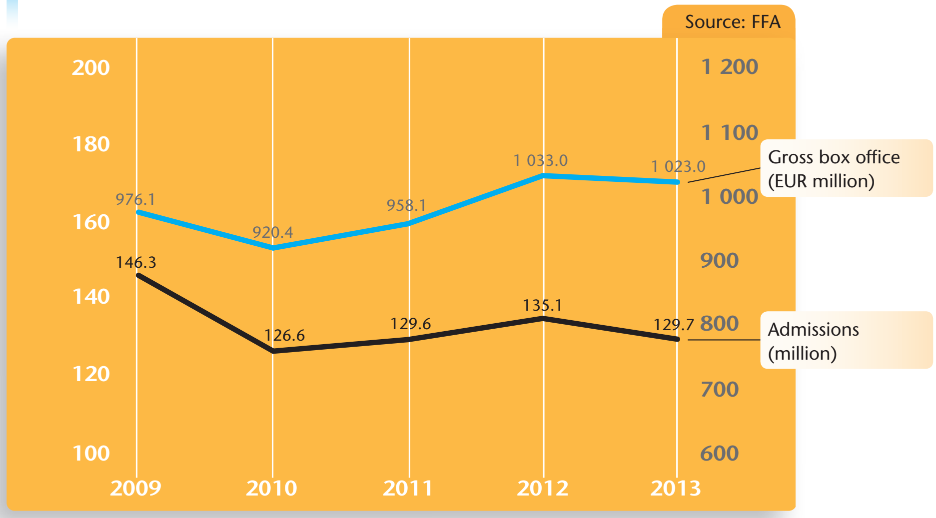
Market shares 2013



Number of German films on first release I 2009-2013



Admissions and gross box office I 2009-2013



Top 20 films by admissions in Germany | 2013

	Original title	Country of origin	Director	Distributor	Admissions
1	Fack ju Göhte	DE	Bora Dagtekin	Constantin Film	5 622 273
2	The Hobbit: The Desolation of Smaug	US/NZ inc	Peter Jackson	Warner Bros.	4 598 732
3	Django Unchained	US	Quentin Tarantino	Sony Pictures Releasing	4 492 362
4	Despicable Me 2	US	P. Coffin, C. Renaud	Universal Pictures	3 671 477
5	The Hunger Games: Catching Fire	US	Francis Lawrence	StudioCanal	3 454 421
6	Frozen	US	C. Buck, J. Lee	Walt Disney Studios	3 332 967
7	The Hangover Part III	US	Todd Phillips	Warner Bros.	3 103 510
8	Furious 6	US/ES	Justin Lin	Universal Pictures	2 864 866
9	Kokowääh 2	DE	Künstler, Schweiger	Warner Bros.	2 749 139
10	Schlussmacher	DE	M. Schweighöfer, ...	20th Century Fox	2 569 847
11	The Smurfs 2	US	Raja Gosnell	Sony Pictures Releasing	2 510 000
12	The Croods	US	C. Sanders, K. Micco	20th Century Fox	2 348 464
13	The Hobbit: An Unexpected Journey	US/NZ inc	Peter Jackson	Warner Bros.	2 168 645
14	Iron Man 3	US/CN	Shane Black	Concorde Filmverleih	1 921 563
15	Life of Pi	US/TW	Ang Lee	20th Century Fox	1 617 142
16	A Good Day to Die Hard	US	John Moore	20th Century Fox	1 557 500
17	Star Trek: Into Darkness	US	J.J. Abrams	Paramount	1 516 301
18	Grown Ups 2	US	Dennis Dugan	Sony Pictures Releasing	1 428 671
19	Monsters University	US	Dan Scanlon	Walt Disney Studios	1 402 630
20	Thor: The Dark World	US	Alan Taylor	Walt Disney Studios	1 389 517

Source: FFA

Distribution and exhibition

Like the majority of European countries Germany registered a box office decline in 2013. Admissions fell to 129.7 million, a 4% drop compared to the strong results in 2012. Gross box office surpassed the 1 billion benchmark the second time in history, amounting to EUR 1 023 million, just EUR 10 million less than the record level of 2012.

Admissions to German films however increased strongly in contrast to the overall market, jumping from 24 million in 2012 to 33.6 million tickets sold and bringing local films a market share of 26.2%, the third highest level on record. School comedy *Fack Ju Göhte* stood out among a total of seven German films attracting over 1 million admissions: with a runaway success of over 5.6 million tickets sold it topped the charts leaving behind US blockbusters such as *The Hobbit* or *Django Unchained*, and became the most successful German film of the past five years.

One out of four tickets was sold to 3D films. A total of 48 3D films were on release in 2013, 8 more than in the previous year. US productions continue to dominate the 3D market with 33 films compared to 8 German and 7 European 3D productions, hence contributing to the increase in market share for US films from 61.1% to 65.4%. The market share for European films however fell dramatically from 20.8% in 2012 – caused by the exceptionally good results of *Intouchables* – to 6.1%.

The number of first releases increased by 12 to 563 films, the highest level on record, while the number of cinemas continued to decrease to 890 theatres operating 4 610 screens.

Production and funding

German production activity maintained a high level with 236 feature films released in 2013, 5 less than in the record year 2012. This makes Germany the third largest feature film producing country in Europe.

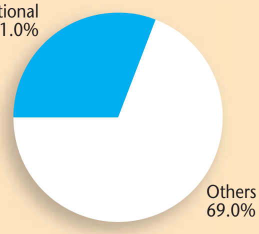
Good news for producers came from a ruling by the Federal Constitutional Court in January 2014, which ended ten-years of legal proceedings initiated by the multiplex chain UCI. The exhibitor had contested the equality of the levy treatment of exhibitors, the video industry and broadcasters as regulated in the German Film Law. The ruling against UCI secures the future of the German film funding system for the years to come. The overall level of public support for film and TV production amounted to over EUR 351 million. The Government announced in April 2014 that the DFFF budget would be reduced by EUR 10 million to EUR 60 million.

Source: FFA, SPIO, *Blickpunkt Film*, MEDIA Salles, OBS

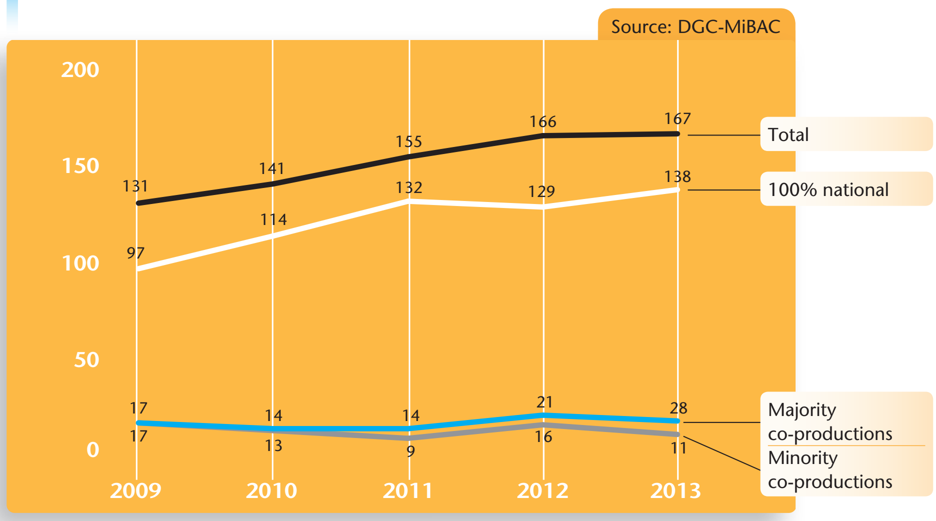
Italy

Population 2013 [e]	59.7 million
GDP per capita 2013 [e]	33 909 USD
Gross box office 2013	646.3 M EUR (858.3 M USD)
Admissions 2013	106.7 million
Average ticket price 2013	6.1 EUR (8.0 USD)
Average admissions per capita 2013	1.8
Screens 2012 | 2013	3 808 | ~
Digital screens 2012 | 2013	2 112 | 2 850
Digital 3D screens 2012 | 2013	1 131 | 1 195

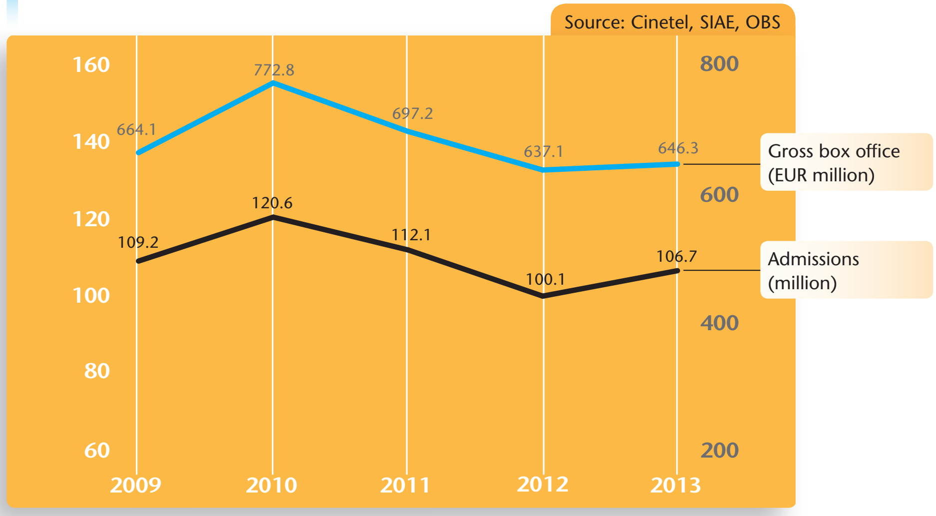
Market shares 2013



Number of Italian feature films produced | 2009-2013



Admissions and gross box office | 2009-2013



Top 20 films by admissions in Italy | 2013

	Original title	Country of origin	Director	Distributor	Admissions
1	Sole a catinelle	IT	Gennaro Nunziante	Medusa Film	8 005 352
2	Despicable Me 2	US	P. Coffin, C. Renaud	Universal	2 396 999
3	Il principe abusivo	IT	Alessandro Siani	01 Distribution	2 380 475
4	Iron Man 3	US/CN	Shane Black	Walt Disney	2 289 885
5	Furious 6	US/ES	Justin Lin	Universal	1 970 531
6	The Hangover Part III	US	Todd Phillips	Warner Bros.	1 942 171
7	Django Unchained	US	Quentin Tarantino	Warner Bros.	1 865 274
8	Frozen	US	C. Buck, J. Lee	Walt Disney	1 735 921
9	The Croods	US	C. Sanders, K. Micco	20th Century Fox	1 700 087
10	La migliore offerta	IT	Giuseppe Tornatore	Warner Bros.	1 520 043
11	The Hobbit: The Desolation of Smaug	US/NZ inc	Peter Jackson	Warner Bros.	1 462 728
12	Monsters University	US	Dan Scanlon	Walt Disney	1 421 951
13	Benvenuto Presidente!	IT	Riccardo Milani	01 Distribution	1 383 987
14	Colpi di fortuna	IT	Neri Parenti	Universal	1 321 499
15	The Hunger Games: Catching Fire	US	Francis Lawrence	Universal	1 252 962
16	The Great Gatsby	AU/US	Baz Luhrmann	Warner Bros.	1 195 257
17	Thor: The Dark World	US	Alan Taylor	Walt Disney	1 186 206
18	Un fantastico via vai	IT	Leonardo Pieraccioni	01 Distribution	1 135 102
19	La grande bellezza	IT/FR	Paolo Sorrentino	Medusa Film	1 108 859
20	Lincoln	US	Steven Spielberg	20th Century Fox	1 067 782

Source: Cinetel

Distribution and exhibition

After declining for two consecutive years, Italy was the only market out of the big 5 EU markets which registered a box office increase in 2013. Admissions grew by 6.6% to an estimated 106.7 million while GBO increased only slightly by 1.4% to an estimated EUR 646 million as average ticket prices dropped by 4.8% to EUR 6.1, a level last registered in 2009.

Box office growth was largely driven by the success of Italian films with a total of seven local productions making it into the 20 top grossing films and runaway success *Sole a catinelle*, a father-son vacation comedy, selling over 8 million tickets, more than any other film in recent history in Italy.

Warner Bros. led the distribution market taking about 20% of total admissions, followed by Universal (15%), Medusa Film and 01 Distribution (13.4% each). Italy has been somewhat lagging behind the other leading European markets in terms of digitisation, though digital screen penetration jumped from around 55% in 2012 to 75%.

Production and funding

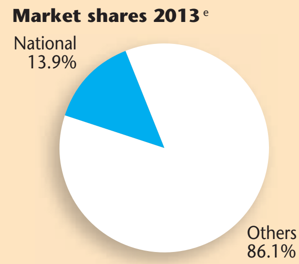
Italian production activity stabilized at a high level of 167 feature films certified in 2013. This compares to 131 films five years ago before the Italian government introduced a package of film production incentives in 2009. These incentives had been approved for 2013 but some feared that due to the weak economy and political instability the country´s tax incentives would be frozen or not renewed. It was estimated that the uncertainty about the future of the country´s tax incentives cost the Italian film industry about USD 30 million as productions withdrew. According to trade association ANCIA, total investment in film production dropped to EUR 358 million in 2013, EUR 135 million less than in 2012. Average production costs for 100% national films decreased by 15% to EUR 1.69 million and even fell by 30% for foreign majority co-productions from EUR 10 million to EUR 7 million. The Italian film industry was therefore relieved to see the Government renew its film production incentives in the second half of 2013. With the now approved new decree called "Valore Cultura" the Italian state will provide a total of EUR 110 million in production incentives over the next three years. The incentives include a 20% tax break for local producers as well as a 40% tax shelter for outside investors. Foreign productions are given a 25% tax credit capped at USD 7 million.

Source: DGC-MiBAC, Cinetel, ANICA, *Giornale dello Spettacolo, Variety, Screen International*, MEDIA Salles

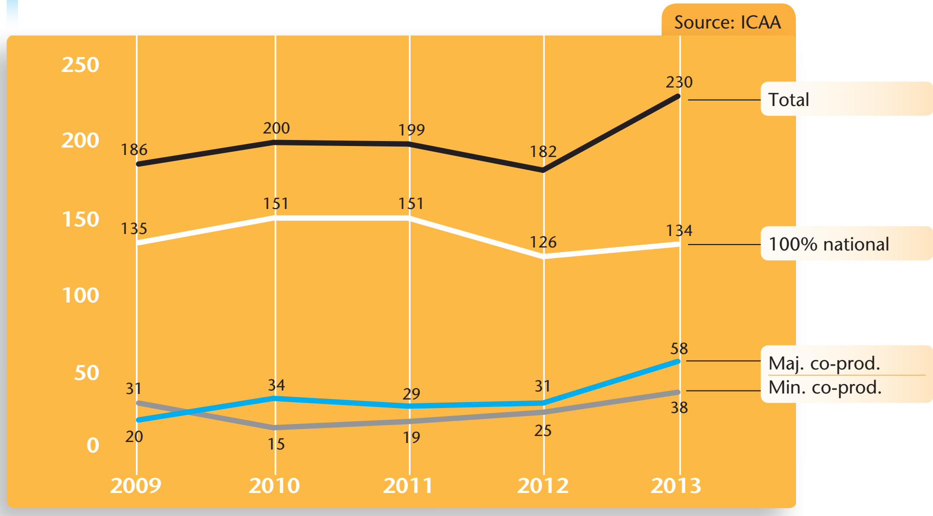
Spain

Population 2013 [e]	46.7 million
GDP per capita 2013 [e]	29 409 USD
Gross box office 2013	504.1 M EUR (669.4 M USD)
Admissions 2013	78.2 million
Average ticket price 2013	6.4 EUR (8.6 USD)
Average admissions per capita 2013	1.7
Screens 2012 I 2013	3 998 I 3 894
Digital screens 2012 I 2013	1 800 I 2 720
Digital 3D screens 2012 I 2013	960 I 1 030

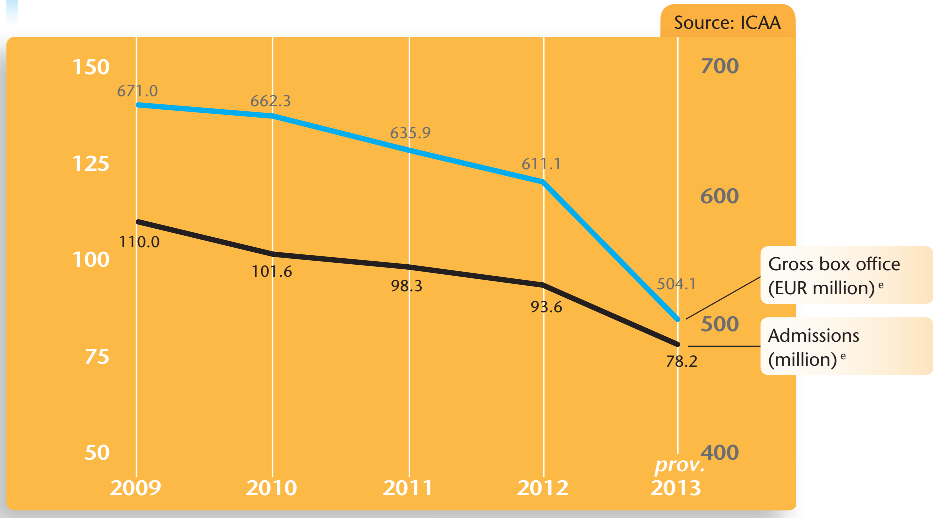
Market shares 2013 [e]



Number of Spanish feature films produced I 2009-2013



Admissions and gross box office I 2009-2013 *prov.*



Top 10 foreign films by admissions in Spain | 2013 [e]

	Original title	Country of origin	Director	Distributor	prov. Admissions
1	Despicable Me 2	US	P. Coffin, C. Renaud	UPI	2 161 591
2	The Croods	US	C. Sanders, K. Micco	20th Century Fox	2 103 153
3	The Hobbit: The Desolation of Smaug	US/NZ inc	Peter Jackson	Warner Bros.	1 860 663
4	Monsters University	US	Dan Scanlon	Walt Disney	1 855 487
5	Frozen	US	C. Buck, J. Lee	Walt Disney	1 809 680
6	World War Z	US	Marc Forster	Paramount Spain	1 803 664
7	Now You See Me	US	Louis Leterrier	Ecran Distribucion	1 620 594
8	The Hunger Games: Catching Fire	US	Francis Lawrence	eOne Films	1 564 336
9	Django Unchained	US	Quentin Tarantino	Sony Pictures	1 533 648
10	Iron Man 3	US/CN	Shane Black	Walt Disney	1 418 636

Source: ICAA, IMDB, BoxOfficeMojo

Top 10 Spanish [(1)] films by admissions in Spain | 2013 [e]

	Original title	Country of origin	Director	Distributor	prov. Admissions
1	Furious 6	US/ES	Justin Lin	UPI	1 456 529
2	Mama	CA/ES	Andrés Muschietti	UPI	1 160 401
3	Zipi y Zape y el club de la canica	ES	Oskar Santos	Walt Disney	844 110
4	Las brujas de Zugarramurdi	ES/FR	Álex de la Iglesia	UPI	787 710
5	Los amantes pasajeros	ES	Pedro Almodóvar	Warner Bros.	706 279
6	Tres bodas de más	ES	Javier Ruiz Caldera	Warner Bros.	627 091
7	El cuerpo	ES	Oriol Paulo	Sony Pictures	497 131
8	Séptimo	ES/AR	Patxi Amézcua	20th Century Fox	460 062
9	La gran familia española	ES	D. Sánchez Arévalo	Warner Bros.	454 509
10	Justin and the Knights of Valour	ES	Manuel Sicilia	Sony Pictures	385 055

(1) Including minority co-productions.

Source: ICAA, IMDB, BoxOfficeMojo

Distribution and exhibition

Although the Spanish box office has been in constant decline, both by admissions and GBO, over the last 5 years, 2013 witnessed the sharpest drop of attendance in the country's recent history. More than 15 million tickets less were sold this year (16.4% down on 2012), resulting on GBO shrinking to EUR 504 million, more than EUR 100 million less than the year before. Average ticket prices went slightly down for the first time in 5 years. The industry argues that the drastic VAT hike for cinema tickets, from 8% to 21%, implemented by the end of 2012 along with rampant piracy and a weak economy are mainly responsible for this drop in cinema attendance.

The national market share dropped to 14% after an above-average 2012. After two years with Spanish blockbusters ranking high-up at the box office lists, no local production made it to the top 10, nor grabbed more than one million admissions. Spain lost 104 screens in 2013, albeit also gave an important boost to the digital roll-out with the conversion of 920 screens, reaching a penetration rate of 70%, still far behind the EU average.

Production and funding

Despite the crisis at the box office, production figures reached a historical peak in 2013 with 230 films certified by ICAA. Both majority and minority co-production grew in number, representing together 42% of the total. That said, the average budget dived way down to EUR 0.7 million.

The endowment of the ICAA cinema fund has been in constant decrease in recent years; in 2013 just EUR 39 million were granted (17% less than in 2012). EUR 33.7 million has been allocated for 2014. Moreover, many producers are still waiting to cash the support granted to them in previous years. The public film financing system in Spain is shifting towards a model increasingly based on fiscal incentives; however, the planned restructure of the tax discounts for film producers, which may go up to 25% of their investment, seems to be stuck.

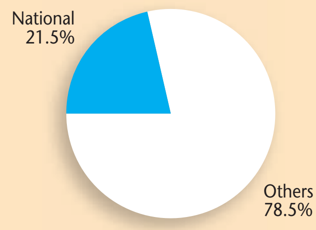
In early 2014 the Spanish government approved a new Intellectual Property Law which is tougher on aggregators linking to illegal contents. This new piece of legislation has now to be passed by the Congress and the Senate.

Source: ICAA, *Screen International*, *Cineinforme*, *Variety*, OBS

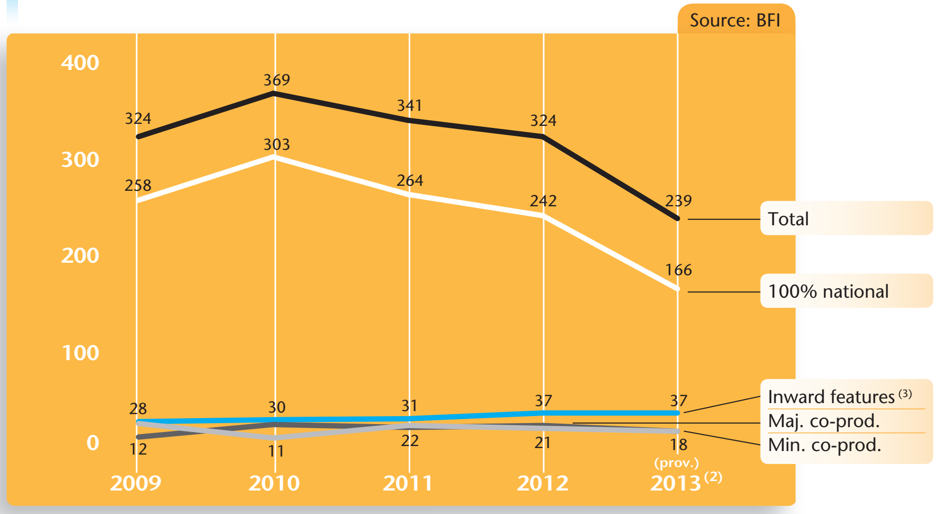
United Kingdom

Population 2013 e	63.9 million
GDP per capita 2013 e	39 049 USD
Gross box office 2013	1.08 bn GBP (1.69 bn USD)
Admissions 2013	165.5 million
Average ticket price 2013	6.5 GBP (10.2 USD)
Average admissions per capita 2013	2.6
Screens 2012 I 2013	3 817 I 3 867
Digital screens 2012 I 2013	3 544 I 3 860
Digital 3D screens 2012 I 2013	1 575 I 2 021

Market shares 2013

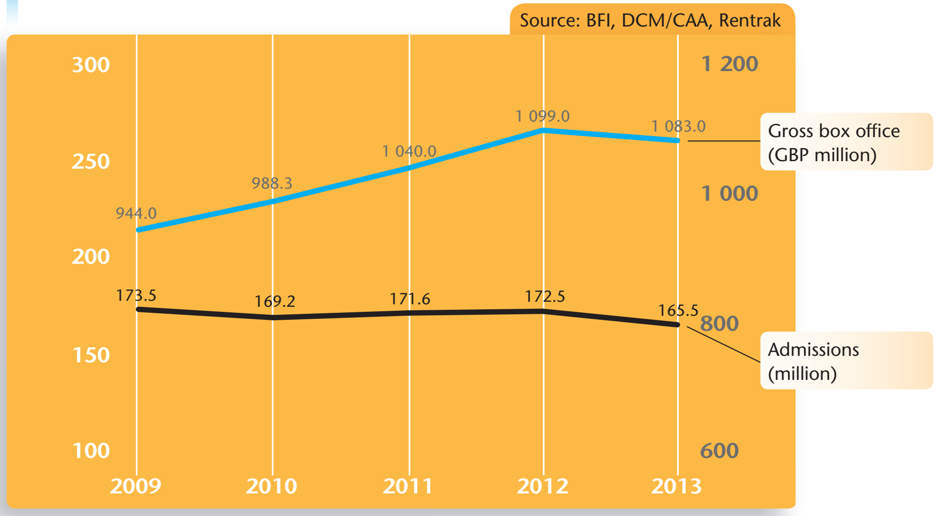


Number of UK films produced I 2009-2013 (1)



(1) In contrast to previous years production figures include feature films with budgets below GBP 500 000.
(2) The decline in 2013 films with budgets below GBP 500 000 could be partly due to a time lag in obtaining data.
(3) 2013 figure to be treated as provisional figures due to time lage in obtaining data on films with budgets below GBP 500 000.

Admissions and gross box office I 2009-2013



Top 20 films by gross box office in the United Kingdom & Ireland | 2013 [e]

Estimated admissions based on average ticket price of GBP 6.54.

	Original title	Country of origin	Director	Distributor	Admissions [e]
1	Despicable Me 2	US	P. Coffin, C. Renaud	Universal Pictures	7 256 469
2	Les Misérables	US/GB	Tom Hooper	Universal Pictures	6 241 330
3	The Hobbit: The Desolation of Smaug	US/NZ inc	Peter Jackson	Warner Bros.	5 705 954
4	Iron Man 3	US/CN	Shane Black	Walt Disney	5 652 181
5	The Hunger Games: Catching Fire	US	Francis Lawrence	Lionsgate	5 045 241
6	Frozen	US	C. Buck, J. Lee	Walt Disney	4 710 657
7	Monsters University	US	Dan Scanlon	Walt Disney	4 685 587
8	Man of Steel	US/CA/GB	Zack Snyder	Warner Bros.	4 579 630
9	Gravity	US/GB inc	Alfonso Cuarón	Warner Bros.	4 228 767
10	The Croods	US	C. Sanders, K. Micco	20th Century Fox	4 089 359
11	Star Trek: Into Darkness	US	J.J. Abrams	Paramount	3 948 167
12	Furious 6	US/ES	Justin Lin	Universal Pictures	3 864 677
13	Wreck-It Ralph	US	Rich Moore	Walt Disney	3 636 030
14	Thor: The Dark World	US	Alan Taylor	Walt Disney	3 034 208
15	The Hangover Part III	US	Todd Phillips	Warner Bros.	2 954 526
16	Captain Phillips	US	Paul Greengrass	Sony Pictures	2 427 453
17	Django Unchained	US	Quentin Tarantino	Sony Pictures	2 406 251
18	The Great Gatsby	AU/US	Baz Luhrmann	Warner Bros.	2 405 899
19	Oz the Great and Powerful	US	Sam Raimi	Walt Disney	2 335 764
20	World War Z	US	Marc Forster	Paramount	2 228 065

Source: BFI

Distribution and exhibition

Like in many other European markets UK box office growth came to a preliminary halt in 2013. GBO decreased slightly by 1.5% to GBP 1.08 billion ending a six-year period of continuous growth. Admissions fell to 165.5 million, a 4% drop from 2012 and the lowest level since 2008. The drop in box office volume was caused primarily by the lack of a runaway success like *Skyfall* in 2012, which also contributed to UK market share falling from 32% to 21.5%, splitting into 15.5% for inward investment films with US studio backing and 6% for domestic UK productions.

In order to improve the theatrical distribution of local productions in the UK and the US the BFI introduced two new support schemes in early 2014. At Sundance the BFI launched a pilot scheme to grant awards of up to GBP 25.000 to US distributors for releasing UK films in the US. A bit later it revealed an initiative allowing BFI-backed producers to use part of their Lottery production award to pay up to 50% of the UK distribution minimum guarantee. In return distributors would grant them a corresponding share in net revenues which would be held by the BFI for re-investment in their future projects.

Production and funding

Total UK production volume - including inward investment films - fell from 324 to 239 films. Part of this seemingly dramatic decline can however be explained by a time lag in identifying UK productions with budget of less than GB 500 000 which account for the majority of domestic productions which fell from 242 to 166 films starting principal photography in 2013.

Annual production spend in the UK increased by 14% to GBP 1.075. 81% of total production spend came from 37 inward investment productions, indicating the high reliance of the UK film sector on US inward investments.

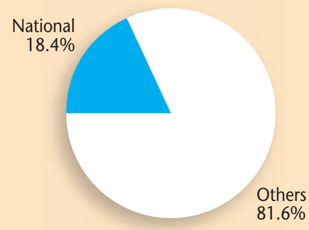
After having been criticized by parts of the industry for cutting the BFI´s resource funding by 10% in mid-2013, the UK government received widespread applause for the changes introduced to its tax relief which were approved by the European Commission in March 2014 and are to be implemented in the course of the year. Changes include the raising of the tax relief for large budget films from 20% to 25% for the first GBP 20 million in qualifying expenditures on the one hand, as well as reducing the minimum UK expenditure requirement from 25% to 10% and expanding the cultural test to allow for European as well as British culture on the other hand. The changes are expected to be particularly beneficial for bringing VFX/post-production projects and stimulating international co-productions.

Source: BFI, DCM, *Screen International,* Media Salles

Russian Federation

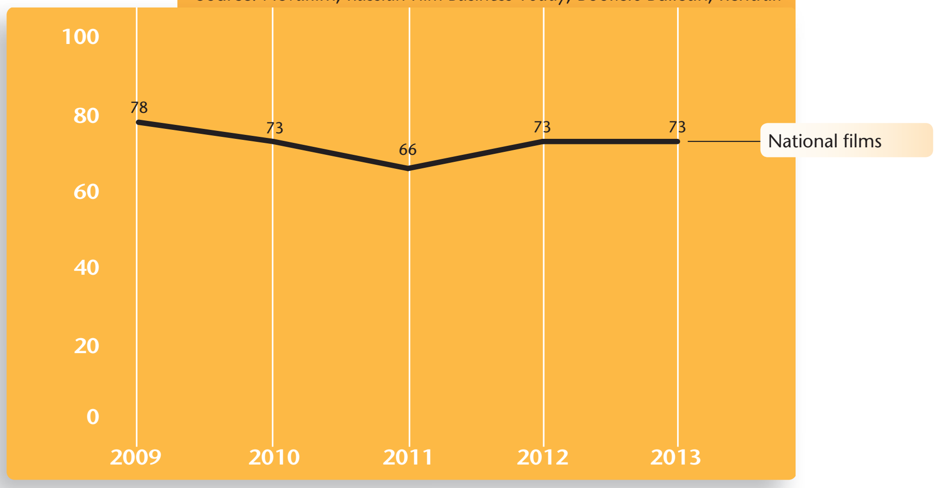
Population 2013 [e]	143.3 million
GDP per capita 2013 [e]	14 973 USD
Gross box office 2013	42.56 bn RUB (1.34 bn USD)
Admissions 2013	177.1 million
Average ticket price 2013	240.3 RUB (7.5 USD)
Average admissions per capita 2013	1.2
Screens 2012 I 2013	3 100 I 3 479
Digital screens 2012 I 2013	2 100 I 2 967
Digital 3D screens 2012 I 2013	1 966 I 2 327

Market shares 2013



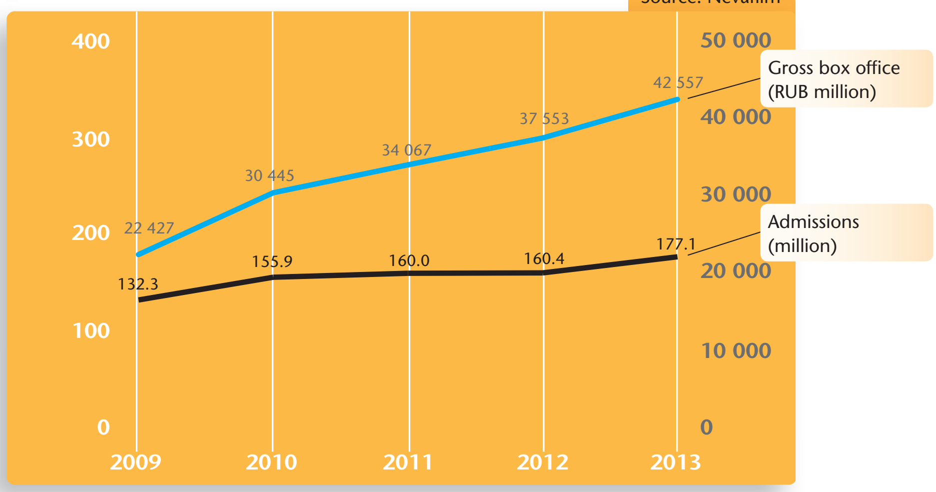
Number of Russian films on first release | 2009-2013

Source: Nevafilm, *Russian Film Business Today*, Bookers Bulletin, Rentrak



Admissions and gross box office in Russia | 2009-2013

Source: Nevafilm



Top 20 films by admissions in the Russian Federation | 2013

	Original title	Country of origin	Director	Distributor	Admissions [e]
1	Stalingrad	RU	Fedor Bondarchuk	Walt Disney, Sony...	6 200 000
2	Despicable Me 2	US	P. Coffin, C. Renaud	Universal Pictures	5 418 036
3	Iron Man 3	US/CN	Shane Black	Walt Disney, Sony...	5 229 440
4	Furious 6	US/ES	Justin Lin	Universal Pictures	4 988 981
5	Thor: The Dark World	US	Alan Taylor	Walt Disney, Sony...	4 300 000
6	Legenda No. 17	RU	Nikolay Lebedev	Central Partnership	4 200 000
7	The Croods	US	C. Sanders, K. Micco	20th Century Fox (RU)	4 200 000
8	Gorko!	RU	Zhora Kryzhovnikov	Bazelevs Distribution	3 705 258
9	Monsters University	US	Dan Scanlon	Walt Disney, Sony...	3 500 000
10	Frozen	US	Chris Buck, Jennifer Lee	Walt Disney, Sony...	3 442 370
11	The Hunger Games: Catching Fire	US	Francis Lawrence	Volga (RU)	3 400 000
12	The Hobbit: The Desolation of Smaug	US/NZ inc	Peter Jackson	Karo Premier	3 379 472
13	Tri bogatyrya na dalnikh beregakh	RU	Konstantin Feoktistov	Nashe Kino	3 267 525
14	World War Z	US	Marc Forster	Central Partnership	3 215 130
15	Oz the Great and Powerful	US	Sam Raimi	Walt Disney, Sony...	3 194 099
16	Life of Pi	US/TW	Ang Lee	20th Century Fox (RU)	3 082 000
17	Now You See Me	US	Louis Leterrier	Central Partnership	3 041 507
18	The Wolverine	US/GB	James Mangold	20th Century Fox (RU)	3 015 997
19	Turbo	US	David Soren	20th Century Fox (RU)	2 935 699
20	We're the Millers	US	R. Marshall Thurber	Karo Premier	2 718 981

Source: *Russian Film Business Today, Booker's Bulletin Magazine, Nevafilm Research*

Distribution and exhibition

After having come to a temporary halt in 2012, Russian box office continued its impressive growth trend of recent years with admissions climbing by 10.4% to a new record high of 177 million in 2013. GBO even increased by 13.3% to RUB 42.6 billion (USD 1.3 billion). For the first time since 2008, a Russian production - 3D WW II epic *Stalingrad* – topped the box office charts and another three local productions made it into the top 20, compared to only one in 2012. National market share increased from 16.1% to 18.4%, the highest level since 2009.

Earlier this year Russia´s Minister of Culture confirmed his intentions to introduce a 20% screening quota for Russian films in cinemas. When discussed in 2012 along with the introduction of VAT of 18% on foreign films, this proposal however did not find the approval of many Russian filmmakers, distributors and exhibitors, some of them fearing that such a move could lead to even higher ticket prices and have a negative impact on admissions.

Some independent films struggled to find screen space as the number of new releases increased by 107 films to 632 first releases. By the end of 2013 over 85% of Russia´s 3 479 screens had been converted to digital projection systems, almost 80% of them equipped for 3D. 3D films took almost 40% of total GBO, the highest 3D market share reported in Europe.

Production and funding

A total of 73 Russian films were released theatrically in 2013, the same number as in 2012 when a total of 108 Russian films were produced. In January 2014 the Government announced plans to transform national film support into a revolving fund. The Russian Cinema Fund, which focuses on the support of commercial films while the Ministry of Culture is responsible for funding "cultural" and "socially significant" films, would be endowed with a higher proportion of the country´s national film funding budget and would be increasingly financed through repayments from successful productions. This way the Government aims to double the Fund´s budget by 2017 with 50% of the financing coming from the State and the other 50% from recoupments.

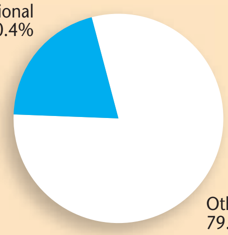
After closing the Cinema Fund´s international department earlier that year, the Government also decided to stop its participation in the German-Russian Co-development Fund in late 2013. The Fund was launched in June 2011.

Source: Nevafilm Research, *Russian Film Business Today, Screen International, Variety*, Media Salles

Poland

Population 2013 [e]	38.5 million
GDP per capita 2013 [e]	13 334 USD
Gross box office 2013	665.1 M PLN (210.2 M USD)
Admissions 2013	36.3 million
Average ticket price 2013	18.3 PLN (5.8 USD)
Average admissions per capita 2013	0.9
Screens 2012 | 2013 [e]	1 200 | 1 259
Digital screens 2012 | 2013	827 | 972
Digital 3D screens 2012 | 2013	607 | 660
Films produced 2012 | 2013	47 | 31

Market shares 2013



Top 10 films by admissions in Poland | 2013

	Original title	Country of origin	Director	Distributor	Admissions
1	The Hobbit: The Desolation of Smaug	US/NZ inc	Peter Jackson	Forum Film	1 160 770
2	Frozen	US	Chris Buck, Jennifer Lee	Disney	1 054 856
3	Drogówka (Traffic Department)	PL	Wojciech Smarzowski	Next Film	1 015 418
4	The Hobbit: An Unexpected Journey	US/NZ inc	Peter Jackson	Forum Film	980 247
5	Wałesa. Człowiek… (Walesa. Man of Hope)	PL	Andrzej Wajda	Vue Movie	956 514
6	The Smurfs 2	US	Raja Gosnell	UIP	823 820
7	The Hunger Games: Catching Fire	US	Francis Lawrence	Forum Film	697 897
8	Monsters University	US	Dan Scanlon	Disney	627 898
9	Iron Man 3	US/CN	Shane Black	Disney	611 850
10	Sep (The Vulture)	PL	Eugeniusz Korin	ITI Cinema	603 849

Source: PISF

Distribution and exhibition

Admissions dropped to 36.3 million, a 5.6% drop year-on-year and the lowest level in the past five years. Gross box office takings even fell by 6.5% to PLN 665 million (USD 2010 million) as average ticket prices decreased for the third year in a row, falling to PLN 18.3 (USD 5.8).

Box office charts were once more dominated by US films with *The Hobbit: The Desolation of Smaug* and *Frozen* taking 1st and 2nd place, ahead of the year´s most successful local production, *Drogówka*, a crime drama about police officers in the Warsaw Traffic Department. With *Wałesa. Człowiek z nadzie,*, a biopic about Lech Walesa, and the action thriller *Sep*, two additional Polish films made it into the top 10 and contributed to national market share increasing by 1.3 percentage points to 20.4%.

A total of 312 feature films were released in Polish cinemas, ten more than in 2012, while the number of 3D releases fell from 43 to 38 films in 2013. Market share for 3D films fell accordingly to 20.6% of admissions, compared to 23.4% in 2012 and 27.6% in 2013, suggesting that the format has reached maturity in Poland.

UIP led the Polish distribution market with a market share of 16.5%, followed by Kino Swiat (13.9%), Disney (12.1%) and Forum Film (12.0%). In the exhibition sector, the number of screens continued to increase from around 1 200 to 1 259 by the end of 2013. With a digital screen penetration rate of 77% Poland ranked in the lower midfield of EU Member States in terms of digitisation.

Production and funding

While Poland produced about 45 theatrical feature films per year between 2007 and 2012, production activity dropped to 31 feature films produced in 2013. The drop was caused primarily by a decline in 100% national fiction films, falling from 28 films in 2012 to 19 films in 2013, and a reduction in the number of minority co-produced fiction films, which decreased from 10 to 3.

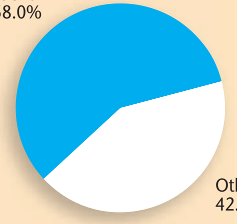
The Polish Film Institute´s (PISF) budget amounts to EUR 31 million for 2014 with about EUR 21 million earmarked for production support, EUR 4.5 million going to film education / film culture, EUR 2.7 million to exhibition support and EUR 1.9 million to the promotion of Polish films abroad. National film funding is complemented by 9 regional funds with a cumulative budget of about EUR 2 million.

Source: Polish Film Institute, MEDIA Salles, OBS

Turkey

Population 2013 [e]	75.6 million
GDP per capita 2013 [e]	10 745 USD
Gross box office 2013	505.3 M TRY (265.8 M USD)
Admissions 2013	50.4 million
Average ticket price 2013	10.0 TRY (5.3 USD)
Average admissions per capita 2013	0.7
Screens 2012 I 2013 [e]	2 093 I 2 243
Digital screens 2012 I 2013	360 I 1 073
Digital 3D screens 2012 I 2013	280 I 433
Films produced 2012 I 2013	77 I 95

Market shares 2013



Top 20 films by admissions in Turkey I 2013

	Original title	Country of origin	Director	Distributor	Admissions [e]
1	Dügün dernek	TR	Selçuk Aydemir	UIP	4 072 898
2	CM101MMXI Fundamentals	TR	Murat Dundar	Tiglon	3 842 479
3	Celal ile Ceren	TR	Togan Gökbakar	Tiglon	2 853 628
4	Kelebegin ruyasi	TR	Yilmaz Erdogan	UIP	2 158 938
5	Selam	TR	Levent Demirkale	Warner Bros.	2 145 545
6	Hükümet kadin 2	TR	Sermiyan Midyat	UIP	1 508 326
7	Romantik Komedi 2: Bekarliga Veda	TR	Erol Özlevi	Pinema	1 507 603
8	Hükümet kadin	TR	Sermiyan Midyat	UIP	1 402 253
9	Benim dünyam	TR	Ugur Yücel	UIP	1 378 834
10	Furious 6	US/ES	Justin Lin	UIP	1 180 395

Source: Antrakt

Distribution and exhibition

2013 was a good year for Turkish cinema as it registered a record GBO of over TRY 505 million (USD 266 million) and over 50.4 million admissions, a 14.8% increase over 2012 and the highest level since 1983. Box office growth was primarily driven by the popularity of local blockbusters. Led by two comedies *Dügün Dernek* and *CM101MMXI Fundamentals*, Turkish films accounted for 9 out of the top 10 grossing films. On a cumulative level Turkish films took 58% of total admissions, by far the highest national market share for any European country.

Despite comparatively low average ticket prices of just TRY 10 (USD 5.3), the cinema going rate remained among the lowest in all of Europe (0.7 admissions per capita), indicating future growth potential.

While Turkey had been postponing the widespread conversion to digital cinema for years, digitisation gained momentum in 2013 when digital screen penetration jumped from 17% to 48%, still one of the lowest rates in Europe. According to the Turkish producers' association SE-YAP, there remained however open issues with regard to the implementation of VPF models.

Production and funding

Since the introduction of public production support in 2005 Turkish production volume had been growing continuously and reached a new record high in 2013 with a total of 95 films produced, compared to only 25 films ten years ago. Additional stimulation for film production may come with the introduction of a new cinema law, which has been under discussion for some time now and may broaden public support schemes for local as well as foreign films. No official time schedule has been announced but the industry is hoping that it will be passed in 2014.

In early 2014 film festival organizers were alerted about the application of a previously dormant regulation requiring films to obtain a screening permit for Turkish film festivals or other cultural events. Previously this was only applied to commercial releases. This could have a serious impact on festival programming. Over 200 Turkish film professionals signed an open letter calling on the Ministry to revise the regulation. Parts of the Turkish film community are also concerned about classification becoming more conservative, banning e.g. *Nymphomaniac*.

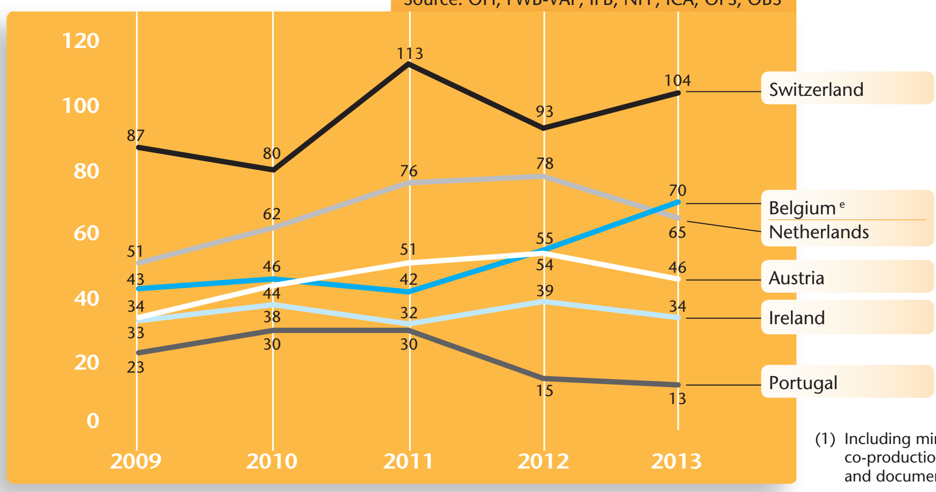
Source: Antrakt, SE-YAP, OBS: *The Turkish film industry 2004-2013 (2014)*, *Today´s Zaman*, Media Salles

Other Western Europe

	Austria	Belgium	Ireland	Netherlands	Portugal	Switzerland
Population 2013 e (million)	8.5	11.2	4.6	16.8	10.5	8.0
GDP per capita 2013 e (USD)	49 256	45 537	47 882	47 651	20 663	80 276
Gross box office 2013 (M USD)	165.5	216.0	136.5	331.3	87.0	229.7
Admissions 2013 (million)	15.2	20.9	14.7	30.8	12.5	13.7
Average ticket price 2013 (USD)	10.9	10.3	9.3	10.8	6.9	16.8
Average admissions per capita 2013	1.8	1.9	3.2	1.8	1.2	1.7
Screens 2013 e	548	497	463	756	545	533
Digital screens 2013	537	491	465	830	425	521
Digital 3D screens 2013	316	151	230	421	226	271
National market shares 2013 e	4.2%	12.9%	0.9%	20.5%	3.4%	6.2%

Number of feature films produced by selected Western European countries (1) | 2009-2013

Source: OFI, FWB-VAF, IFB, NFF, ICA, OFS, OBS

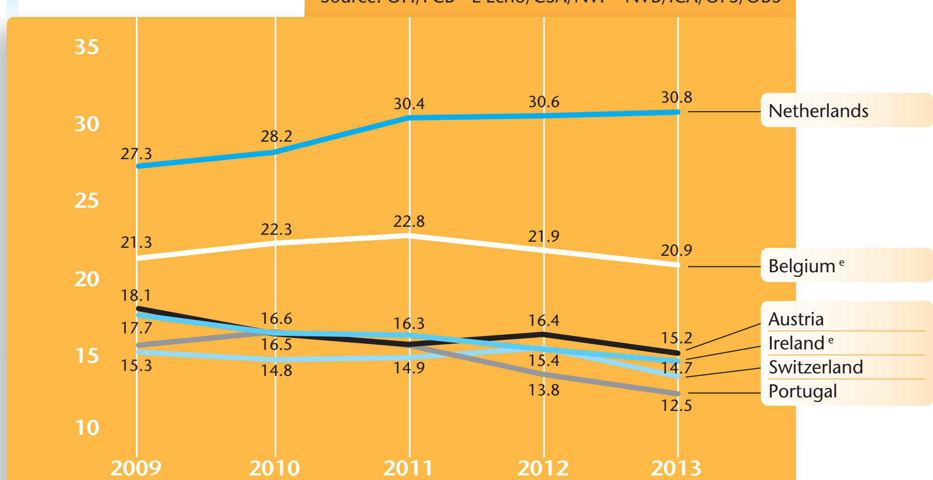


(1) Including minority co-productions and documentaries.

Cinema attendance in selected Western European countries | 2009-2013

In million.

Source: OFI/FCB - L'Echo/CSA/NVF - NVB/ICA/OFS/OBS



Top 10 films by admissions in the Netherlands | 2013

	Original title	Country of origin	Director	Distributor	Admissions
1	Despicable Me 2	US	P. Coffin, C. Renaud	Universal Pictures Int	914 953
2	The Hobbit: The Desolation of Smaug	US/NZ inc	Peter Jackson	Warner Bros.	798 916
3	Verliefd op Ibiza	NL	Johan Nijenhuis	A-Film	714 853
4	De nieuwe wildernis	NL	M. Verkerk, R. Smit	Dutch Film Works	692 649
5	The Hunger Games: Catching Fire	US	Francis Lawrence	Independent Films	687 425
6	The Smurfs 2	US	Raja Gosnell	Universal Pictures Int	627 635
7	Furious 6	US/ES	Justin Lin	Universal Pictures Int	624 055
8	The Hangover Part III	US	Todd Phillips	Warner Bros.	614 805
9	Frozen	US	C. Buck, J. Lee	Walt Disney Studios	533 068
10	Iron Man 3	US/CN	Shane Black	Walt Disney Studios	436 509

Source: MaccsBox - NVB & NVF

Top 10 films by admissions in Austria | 2013

	Original title	Country of origin	Director	Distributor	Admissions
1	Django Unchained	US	Quentin Tarantino	Sony Pictures	549 992
2	The Hobbit: The Desolation of Smaug	US/NZ inc	Peter Jackson	Warner Bros.	485 154
3	The Hangover Part III	US	Todd Phillips	Warner Bros.	484 638
4	Despicable Me 2	US	P. Coffin, C. Renaud	Universal Pictures	424 527
5	Furious 6	US/ES	Justin Lin	Universal Pictures	393 771
6	Rush	GB inc/US/DE	Ron Howard	Constantin Film	391 469
7	Frozen	US	C. Buck, J. Lee	Walt Disney Int'l	383 333
8	Fack ju Göhte (F*ck You, Goethe)	DE	Bora Dagtekin	Constantin Film	354 675
9	The Hunger Games: Catching Fire	US	Francis Lawrence	Const./Studiocanal	354 658
10	The Smurfs 2	US	Raja Gosnell	Sony Pictures	347 614

Source: Austrian Film Institute (OFI)

Top 10 films by admissions in Switzerland | 2013

	Original title	Country of origin	Director	Distributor	Admissions
1	The Hobbit: The Desolation of Smaug	US/NZ inc	Peter Jackson	Warner Bros.	396 914
2	Despicable Me 2	US	P. Coffin, C. Renaud	UIP	390 322
3	Django Unchained	US	Quentin Tarantino	Walt Disney	362 054
4	Furious 6	US/ES	Justin Lin	UIP	343 966
5	The Hunger Games: Catching Fire	US	Francis Lawrence	Impuls Pictures	322 056
6	The Hangover Part III	US	Todd Phillips	Warner Bros.	318 861
7	Frozen	US	C. Buck, J. Lee	Walt Disney	296 659
8	The Croods	US	C. Sanders, K. Micco	20th Century Fox	265 288
9	Iron Man 3	US/CN	Shane Black	Walt Disney	241 377
10	The Great Gatsby	AU/US	Baz Luhrmann	Warner Bros.	207 065

Source: Office fédéral de la statistique (OFS)

Top 10 films by admissions in Portugal | 2013

	Original title	Country of origin	Director	Distributor	Admissions
1	La cage dorée (The Gilded Cage)	FR	Ruben Alves	Lusomundo Audiovis.	757 594
2	Furious 6	US/ES	Justin Lin	Lusomundo Audiovis.	426 919
3	Frozen	US	C. Buck, J. Lee	Lusomundo Audiovis.	405 637
4	Despicable Me 2	US	P. Coffin, C. Renaud	Lusomundo Audiovis.	299 039
5	7 Pecados Rurais	PT	Nicolau Breyner	Lusomundo Audiovis.	287 144
6	The Hangover Part III	US	Todd Phillips	Col. TriStar Warner	275 398
7	The Croods	US	C. Sanders, K. Micco	Big Picture 2 Films	265 045
8	The Smurfs 2	US	Raja Gosnell	Col. TriStar Warner	256 559
9	The Hobbit: The Desolation of Smaug	US/NZ inc	Peter Jackson	Lusomundo Audiovis.	253 302
10	Monsters University	US	Dan Scanlon	Lusomundo Audiovis.	248 825

Source: ICA

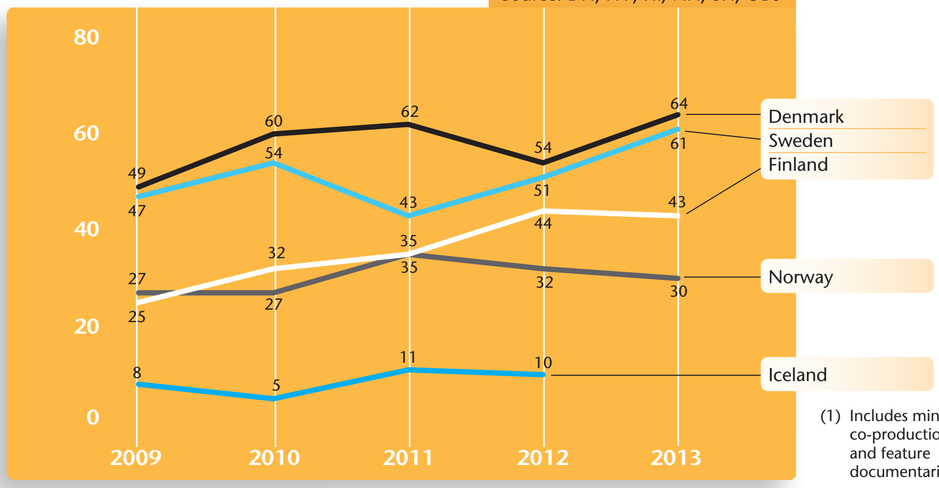
Nordic countries

	Denmark	Finland	Iceland	Norway	Sweden
Population 2013 e (million)	5.6	5.4	0.3	5.1	9.6
GDP per capita 2013 e (USD)	57 999	47 625	45 315	101 271	57 297
Gross box office 2013 (M USD)	187.2	100.9	12.3	186.3	252.2
Admissions 2013 (million)	13.6	7.8	1.4	11.8	16.6
Average ticket price 2013 (USD)	13.8	12.9	8.8	15.8	15.2
Average admissions per capita 2013	2.4	1.4	4.3	2.3	1.7
Screens 2013 e	406	282	41 (1)	422	774
Digital screens 2013	400	284	38	423	707
Digital 3D screens 2013	243	208	27	268	434
National market shares 2013 e	30.0%	23.0%	3.1%	22.8%	24.8%

(1) 2012

Number of feature films produced by Nordic countries (1) | 2009-2013

Source: DFI, FFF, HI, NFI, SFI, OBS



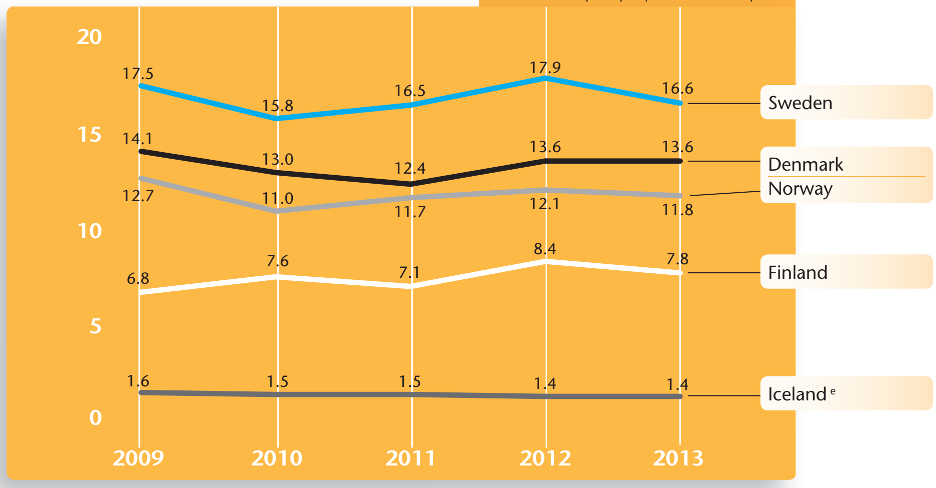
(1) Includes minority co-productions and feature documentaries.

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

Cinema attendance in the Nordic countries | 2009-2013

In million.

Source: DFI/FFF/HI/Film & Kino/SFI



Top 10 films by admissions in Sweden | 2013

	Original title	Country of origin	Director	Distributor	Admissions
1	The Hobbit: The Desolation of Smaug	US/NZ inc	Peter Jackson	SF Film	749 444
2	The Hunger Games: Catching Fire	US	Francis Lawrence	Nordisk Film	558 583
3	Monica Z	SE	Per Fly	SF Film	517 077
4	Despicable Me 2	US	P. Coffin, C. Renaud	UIP/Universal	428 039
5	Hundraåringen som klev ut genom…	SE	Felix Herngren	Walt Disney	423 879
6	Sune i Grekland - All… (Sune in Greece…)	SE	Hannes Holm	Nordisk Film	389 858
7	The Hobbit: An Unexpected Journey	US/NZ inc	Peter Jackson	SF Film	349 133
8	Wreck-It Ralph	US	Rich Moore	Walt Disney	340 170
9	Django Unchained	US	Quentin Tarantino	Sony (Walt Disney)	338 743
10	Iron Man 3	US/CN	Shane Black	Walt Disney	324 587

Source: Swedish Film Institute

Top 10 films by admissions in Denmark | 2013

	Original title	Country of origin	Director	Distributor	Admissions
1	Kvinden i Buret (The Keeper of Lost…)	DK/DE/SE	Mikkel Nørgaard	Nordisk Film	721 256
2	Jagten (The Hunt)	DK/SE	Thomas Vinterberg	Nordisk Film	673 022
3	The Hobbit: The Desolation of Smaug	US/NZ inc	Peter Jackson	SF-Film	478 843
4	Min Søsters Børn i Afrika	DK	M. Miehe-Renard	SF-Film	421 510
5	Alle for To (All for Two)	DK	Rasmus Heide	Nordisk Film	392 118
6	The Hunger Games: Catching Fire	US	Francis Lawrence	Nordisk Film	338 651
7	Spies & Glistrup (Sex, Drugs & Taxation)	DK	Christoffer Boe	Nordisk Film	330 107
8	Iron Man 3	US/CN	Shane Black	Buena Vista	276 983
9	Frozen	US	C. Buck, J. Lee	Buena Vista	274 233
10	Despicable Me 2	US	P. Coffin, C. Renaud	UIP	268 052

Source: Danmark Statistik/DFI

Top 10 films by admissions in Norway | 2013

	Original title	Country of origin	Director	Distributor	Admissions
1	Solan og Ludvig - Jul i Flåklypa	NO	Rasmus A. Sivertsen	Nordisk Filmdistr.	854 210
2	The Hobbit: The Desolation of Smaug	US/NZ inc	Peter Jackson	SF Norway	479 232
3	The Hunger Games: Catching Fire	US	Francis Lawrence	Nordisk Filmdistr.	322 522
4	Iron Man 3	US/CN	Shane Black	Walt Disney	292 389
5	Furious 6	US/ES	Justin Lin	UIP	273 485
6	Despicable Me 2	US	P. Coffin, C. Renaud	UIP	267 122
7	Gåten Ragnarok (Ragnarok)	NO	M. B. Sandemose	Nordisk Filmdistr.	250 570
8	The Croods	US	C. Sanders, K. Micco	20th Century Fox	246 690
9	Wreck-It Ralph	US	Rich Moore	Walt Disney	232 835
10	The Hangover Part III	US	Todd Phillips	SF Norway	218 489

Source: Film og Kino

Top 10 films by admissions in Finland | 2013

	Original title	Country of origin	Director	Distributor	Admissions
1	21 Tapaa Pilata… (21 Ways to Ruin a…)	FI	J. Vuoksenmaa	Nordisk Film	403 045
2	The Hobbit: The Desolation of Smaug	US/NZ inc	Peter Jackson	SF Film	337 325
3	Despicable Me 2	US	P. Coffin, C. Renaud	FK/UNI	258 684
4	The Hunger Games: Catching Fire	US	Francis Lawrence	Nordisk Film	204 663
5	Rölli Ja Kultainen Avain	FI/GB/RU	Taavi Vartia	Nordisk Film	204 545
6	Leijonasydän (Heart of a Lion)	FI/SE	Dome Karukoski	Scanbox	199 469
7	The Hobbit: An Unexpected Journey	US/NZ inc	Peter Jackson	SF Film/SF	196 002
8	Vuonna 85	FI	Koivusalo, Suokas	Walt Disney	165 959
9	Planes	US	Klay Hall	Walt Disney	157 559
10	Monsters University	US	Dan Scanlon	Walt Disney	146 300

Source: Finnish Film Foundation

Baltics and Central Europe

	Czech Republic	Estonia	Hungary	Latvia	Lithuania	Slovakia	Slovenia
Population 2013 e (million)	10.5	1.3	9.9	2.0	3.0	5.4	2.1
GDP per capita 2013 e (USD)	18 868	18 127	13 172	14 924	15 633	17 929	22 719
Gross box office 2013 (M USD)	72.8	15.7	60.7	13.7	17.4	25.2	14.7
Admissions 2013 (million)	11.1	2.6	10.1	2.4	3.3	3.7	2.3
Average ticket price 2013 (USD)	6.6	6.1	6.0	5.7	5.3	6.8	6.3
Average admissions per capita 2013	1.1	1.9	1.0	1.2	1.1	0.7	1.1
Screens 2013 e	684	34	345	66	84	168	112
Digital screens 2013	430	29	288	36	52	133	50
Digital 3D screens 2013	238	20	175	20	25	84	35
Films produced 2013	47	19	32	14 (1)	16	13	16
National market shares 2013 e	24.2%	5.9%	1.5%	4.6%	16.5%	4.4%	10.9%

(1) 2012

Top 10 films by admissions in the Czech Republic | 2013

	Original title	Country of origin	Director	Distributor	Admissions
1	Babovresky	CZ	Zdenek Troska	Falcon	652 458
2	The Hobbit: The Desolation of Smaug	US/NZ inc	Peter Jackson	Warner Bros.	493 999
3	The Smurfs 2	US	Raja Gosnell	Falcon	342 938
4	Príbeh kmotra	CZ	Petr Nikolaev	Bioscop	295 683
5	Ctyrlístek ve sluzbách krále	CZ	Michal Zabka	CinemArt	269 546
6	Iron Man 3	US/CN	Shane Black	Falcon	265 176
7	Despicable Me 2	US	P. Coffin, C. Renaud	CinemArt	258 555
8	Revival	CZ	Alice Nellis	Bontonfilm	240 312
9	Krídla Vánoc	CZ	Karin Babinská	Falcon	237 042
10	Gravity	US/GB inc	Alfonso Cuarón	Warner Bros.	231 424

Source: Unie Filmovvych Distributoru

Top 10 films by admissions in Hungary | 2013

	Original title	Country of origin	Director	Distributor	Admissions
1	Despicable Me 2	US	P. Coffin, C. Renaud	UIP	331 951
2	Iron Man 3	US/CN	Shane Black	Forum-Hungary	303 457
3	The Hobbit: The Desolation of Smaug	US/NZ inc	Peter Jackson	Forum-Hungary	291 212
4	We're the Millers	US	R. Marshall Thurber	Intercom	285 249
5	The Hangover Part III	US	Todd Phillips	Intercom	263 481
6	Frozen	US	Chris Buck, Jennifer Lee	Forum-Hungary	250 489
7	Gravity	US/GB inc	Alfonso Cuarón	Intercom	227 473
8	The Smurfs 2	US	Raja Gosnell	Intercom	219 530
9	Grown Ups 2	US	Dennis Dugan	Intercom	218 913
10	Last Vegas	US	Jon Turteltaub	ProVideo	215 966

Source: National Film Office

Top 10 films by admissions in Slovakia | 2013

	Original title	Country of origin	Director	Distributor	Admissions
1	The Smurfs 2	US	Raja Gosnell	Itafilm	140 822
2	The Hobbit: The Desolation of Smaug	US/NZ inc	Peter Jackson	Continental Film	119 457
3	The Hangover Part III	US	Todd Phillips	Continental Film	117 223
4	Babovresky	CZ	Zdenek Troska	Saturn Entertain.	109 143
5	Despicable Me 2	US	P. Coffin, C. Renaud	Barracuda Movie	101 198
6	Frozen	US	Chris Buck, Jennifer Lee	Saturn Entertain.	95 467
7	Monsters University	US	Dan Scanlon	Saturn Entertain.	87 358
8	The Croods	US	C. Sanders, K. Micco	Barracuda Movie	84 041
9	We're the Millers	US	R. Marshall Thurber	Continental Film	83 081
10	Turbo	US	David Soren	Barracuda Movie	81 607

Source: Slovak Film Institute, UFD

South-Eastern Europe

	BA (2)	Bulgaria	Croatia	Cyprus	Greece	ME (3)	FYROM (4)	Romania
Population 2013 e (million)	3.8	7.3	4.3	0.9	11.1	0.6	2.1	20.0
GDP per capita 2013 e (USD)	4 866	7 411	13 312	24 706	21 617	7 252	5 073	8 630
Gross box office 2013 (M USD)	3.3	27.0	21.2	6.5	78.8	1.0	0.2	48.2
Admissions 2013 (million)	1.0	4.8	4.0	0.6	9.2	0.2	0.1	9.0
Average ticket price 2013 (USD)	3.5	5.6	5.3	10.2	8.6	4.6	2.1	5.3
Average admissions per capita 2013	0.2	0.7	0.9	0.7	0.8	0.4	0.0	0.5
Screens 2013 e	25	165	153	35	482	~	23 (1)	264
Digital screens 2013	12 (1)	163	130	38	120	~	~	226
Digital 3D screens 2013	5 (1)	109	80	16	90	~	~	117
Films produced 2013	6	15	24	1	40	1	13	37
National market shares 2013 e	1%	0.6%	11.1%	0.1%	7.2%	0.0%	~	2.8%

(1) 2012 (2) Bosnia-Herzegovina (3) Montenegro (4) Former Yugoslav Republic of Macedonia

Top 10 films by admissions in Greece | 2013

	Original title	Country of origin	Director	Distributor	Admissions
1	The Hobbit: The Desolation of Smaug	US/NZ inc	Peter Jackson	Village Films	331 105
2	Mikra Anglia (World-Wide)	GR	Pantelis Voulgaris	Feelgood Entertain.	259 361
3	The Hangover Part III	US	Todd Phillips	~	217 092
4	Gravity	US/GB inc	Alfonso Cuarón	Village Films	214 448
5	Iron Man 3	US/CN	Shane Black	Feelgood Entertain.	206 006
6	Despicable Me 2	US	P. Coffin, C. Renaud	UIP	199 235
7	The Smurfs 2	US	Raja Gosnell	Feelgood Entertain.	185 410
8	Furious 6	US/ES	Justin Lin	UIP	181 682
9	Argo	US	Ben Affleck	Village Films	181 200
10	Life of Pi	US/TW	Ang Lee	Odeon	172 427

Source: Greek Film Centre

Top 10 films by admissions in Romania | 2013

	Original title	Country of origin	Director	Distributor	Admissions
1	The Hobbit: The Desolation of Smaug	US/NZ inc	Peter Jackson	Forum Film	304 613
2	Furious 6	US/ES	Justin Lin	Ro-Image 2000	261 312
3	Thor: The Dark World	US	Alan Taylor	Forum Film	225 293
4	Now You See Me	US	Louis Leterrier	Media Pro Distr.	212 030
5	Iron Man 3	US/CN	Shane Black	Forum Film	192 862
6	We're the Millers	US	R. Marshall Thurber	Media Pro Distr.	190 432
7	The Hangover Part III	US	Todd Phillips	Media Pro Distr.	169 654
8	Gravity	US/GB inc	Alfonso Cuarón	Media Pro Distr.	165 606
9	Despicable Me 2	US	P. Coffin, C. Renaud	Ro-Image 2000	164 105
10	The Smurfs 2	US	Raja Gosnell	Intercomfilm Distr.	162 792

Source: Centrul National al Cinematografiei

Top 10 films by admissions in Bulgaria | 2013

	Original title	Country of origin	Director	Distributor	Admissions
1	Furious 6	US	Justin Lin	Forum Film	229 753
2	Frozen	US	C. Buck, J. Lee	Forum Film	178 198
3	The Hobbit: The Desolation of Smaug	US/NZ inc	Peter Jackson	Forum Film	176 258
4	Hansel & Gretel: Witch Hunters	DE/US	Tommy Wirkola	Forum Film	135 816
5	Thor: The Dark World	US	Alan Taylor	Forum Film	130 550
6	Despicable Me 2	US	P. Coffin, C. Renaud	Forum Film	126 196
7	The Hunger Games: Catching Fire	US	Francis Lawrence	Forum Film	118 179
8	Iron Man 3	US/CN	Shane Black	Forum Film	103 551
9	A Good Day to Die Hard	US	John Moore	Aleksandra	98 788
10	The Smurfs 2	US	Raja Gosnell	Aleksandra	98 583

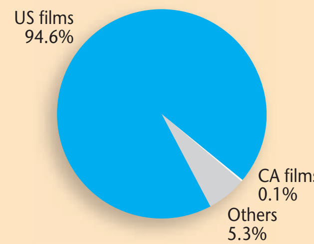
Source: National Film Center

North America

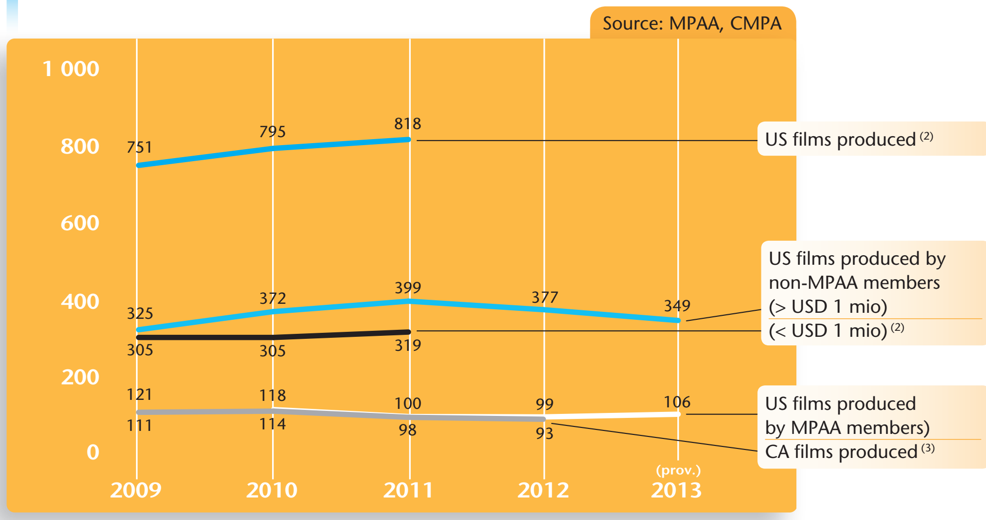
	North America	US	Canada
Population 2013 e (million)	351.7	316.5	35.2
GDP per capita 2013 e (USD)	52 742	52 839	51 871
Gross box office 2013 e (M USD)	10 900	9 782 (1)	1 092 (1)
Admissions 2013 e (million)	1 340	1 229 (1)	131 (1)
Average ticket price 2013 e (USD)	8.1	8.0 (1)	8.34 (1)
Average admissions per capita 2013 e	4.0	3.9 (1)	3.8 (1)
Screens 2013 e	42 814	39 783	3 031
Digital screens 2013 e	39 824	36 802	3 022
Digital 3D screens 2013 e	15 782	14 483	1 299

(1) 2012

Market shares 2013 e



Number of US (1) and Canadian feature films produced | 2009-2013

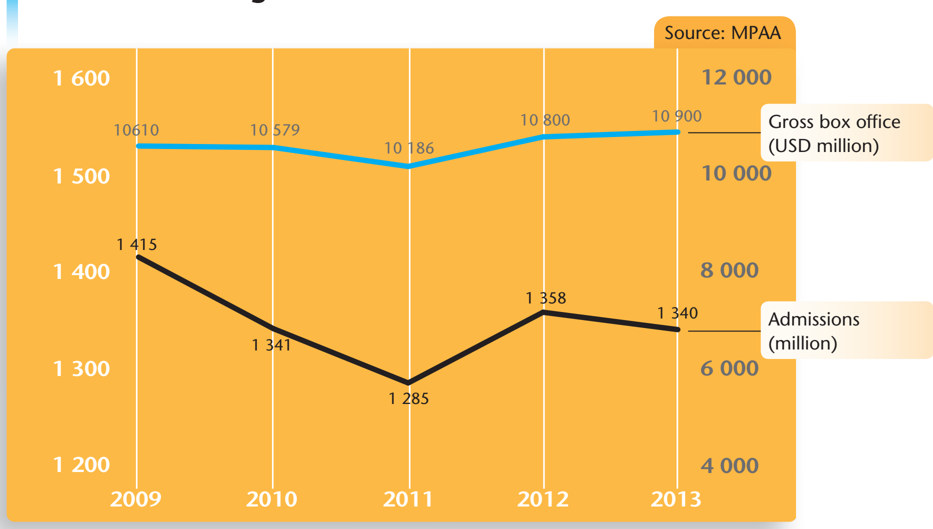


(1) English-language films (Including co-productions). Does not include documentaries, films with budgets below USD 200 000, student films and works not intended for theatrical release.

(2) Since 2011, MPAA does no longer track data for films with budget below USD 1 million.

(3) Revised data. Based on fiscal year April to March (following year).

Admissions and gross box office in the US & Canada | 2009-2013



Top 20 films by admissions in North America | 2013 e

Estimated admissions based on average ticket price of USD 8.13.

	Original title	Country of origin	Director	Distributor	Admissions e
1	Iron Man 3	US/CN	Shane Black	Walt Disney Studios	50 309 224
2	The Hunger Games: Catching Fire (1)	US	Francis Lawrence	Lionsgate	49 004 554
3	Despicable Me 2	US	P. Coffin, C. Renaud	Universal Pictures	45 244 200
4	Man of Steel	US/CA/GB	Zack Snyder	Warner Bros.	35 798 957
5	Frozen (1)	US	Chris Buck, Jennifer Lee	Walt Disney Studios	33 433 160
6	Monsters University	US	Dan Scanlon	Walt Disney Studios	33 024 940
7	Gravity	US/GB inc	Alfonso Cuarón	Walt Disney Studios	31 370 475
8	Furious 6	US/ES	Justin Lin	Universal Pictures	29 357 915
9	Oz the Great and Powerful	US	Sam Raimi	Walt Disney Studios	28 894 443
10	Star Trek: Into Darkness	US	J.J. Abrams	Paramount Pictures	28 140 057
11	The Hobbit: The Desolation of Smaug (1)	US/NZ inc	Peter Jackson	Warner Bros.	25 748 370
12	Thor: The Dark World	US	Alan Taylor	Walt Disney Studios	24 951 630
13	World War Z	US/MT	Marc Forster	Paramount Pictures	24 890 493
14	The Croods	US	C. Sanders, K. Micco	20th Century Fox	23 021 946
15	The Heat	US	Paul Feig	20th Century Fox	19 628 805
16	We're the Millers	US	R. Marshall Thurber	Warner Bros.	18 498 662
17	The Great Gatsby	AU/US	Baz Luhrmann	Warner Bros.	17 815 550
18	The Conjuring	US	James Wan	Warner Bros.	16 900 386
19	Identity Thief	US	Seth Gordon	Universal Pictures	16 544 517
20	Grown Ups 2	US	Dennis Dugan	Sony Pictures	16 441 393

(1) Film still on release in 2014.

Source: *Variety*, OBS

Distribution and exhibition

After a temporary rise in admissions to 1.36 billion in 2012, cinema attendance in the US and Canada dropped again by 1.3% to 1.34 billion in 2013. Despite the decline in admissions gross box office was up 1% from USD 10.8 billion to a record high of USD 10.9 billion thanks to a further 2% increase in average ticket prices.

US productions took an estimated 95% of total admissions in 2013, while Canadian productions only took 0.1%. Sequels once more dominated the box office charts accounting for seven out of the top 10 ranking films with *Iron Man 3* and the second instalments of *The Hunger Games* and *Despicable Me* leading the charts.

With an estimated market share of 18% Walt Disney led the distribution market in 2013, ahead of Warner Bros. (15%) and Universal Pictures (135). A total of 659 films were released in 2013, 83% of which were distributed by non-MPAA members as the number of MPAA releases continued to decline, down to 114 films.

Since its 2010 boom the 3D market share of the box office progressively decreased from 21% down to 16% in 2013. 3D revenues remained steady at USD 1.8 billion for the last three years, suggesting that the format has reached its current market potential, though only around 40% of US digital screens are equipped for 3D projection. With 36 802 digital screens the US reached a digital screen penetration rate of 93% in 2013. The vast majority of US screens (82%) were located in multiplexes with 8 or more screens as the number of screens in smaller venues continued to decrease.

Production and funding

As the MPAA stopped tracking film productions with budgets below USD 1 million in 2011, it is no longer possible to have comprehensive production figures for the US. Based on provisional data, the MPAA reported the number of fiction films with budgets over USD 1 million to have declined from 377 to 349 films beginning production in 2013. 106 of these films were produced by MPAA members as the number of films produced by non-members fell from 377 to 349 films.

Canada produced 93 feature films in the financial year 2012/2013, 5 films less than in the precedent period. However, overall production investment grew by 3.2% over the same period, up to CAD 351 million, mainly boosted by English language productions. 34 titles (36.6% of the total) were shot in French, accounting for just 26.5% of the total investment. Canada and India signed a co-production agreement in early 2014.

Source: MPAA, CMPA, Screen International, Variety, Telefilm Canada, OBS

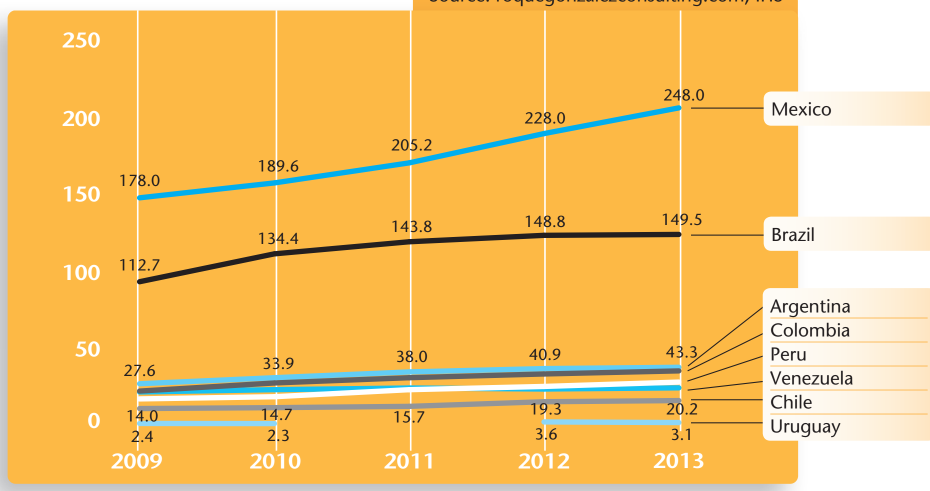
Latin America

	Argentina	Brazil	Chile	Colombia	Mexico	Peru	Uruguay	Venezuela
Population 2013 (million)	41.5	199.9	17.6	47.2	118.2	30.9	3.4	30.0
GDP per capita 2013 (M USD)	11 679	10 958	16 043	7 831	11 224	6 797	16 834	12 256
Gross box office 2013 (M USD)	257.6 e	744.1	119.19	188.3	911.2	131.5	18.5	225.76 e
Admissions 2013 (million)	46.1	149.5	20.21	43.27	248.0	34.6	3.10	30.10
Average ticket price 2013 (USD)	5.3 e	5.45	5.90	4.35	3.49	3.80	5.97	8.0 e
Average admissions per capita 2013 e	1.1	0.7	1.2	0.9	2.1	1.1	1.1	0.9
Screens 2013	866	2 679	340	791	5 547	473	70	464
Digital screens 2013 e	413	1 270	235	620	4 764	240	40	103
Digital 3D screens 2013 e	296	740	129	335	1968	145	24	100
National market shares 2013	15.1%	18.6%	8.1%	5.0%	12.1%	11.7%	1.8%	8.6%

Admissions in Latin America | 2009-2013

In million.

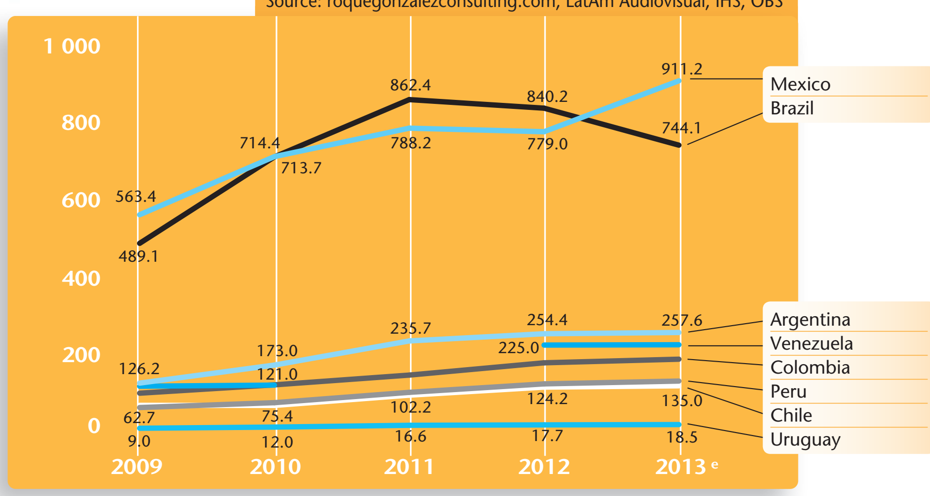
Source: roquegonzalezconsulting.com, IHS



Gross box office in Latin America | 2009-2013 e

USD million.

Source: roquegonzalezconsulting.com, LatAm Audiovisual, IHS, OBS



Overview

Most Latin American markets underwent an upswing in 2013, both by macroeconomic and cinema industry indicators. Admissions have risen by 40% over the last 5 years in the 8 territories tracked with Mexico and Brazil knocking on the door of the top 10 world markets in terms of GBO. Primarily thanks to the domestic success of a couple of local blockbusters, admissions to Latin American films doubled over the same period. Box office throughout the region is however dominated by US films, as none of the main Latin American film industries have significant weight outside their national markets despite co-productions among Latin American countries being quite frequent.

Production levels have been increasing, particularly in the three largest markets - Argentina, Brazil and Mexico - which together produced more than 400 films in 2013. Furthermore, the region started to catch up in the digital roll-out race, reaching a 69% penetration rate by the end of 2013.

Mexico

Mexico registered the strongest box office growth in the region with admissions growing by 20 million from 228 million to 248 million in 2013. GBO even jumped by 17% to USD 911 million thanks to a large increase in average ticket prices. For the first time in many years a Mexican film topped the box office charts. Family comedy *No se aceptan devoluciones* became the most successful local production of all times selling over 15 million tickets. It also ranked #77 at the US box office, becoming the highest-grossing Spanish language film in the US. Boosted by this success and another local comedy, *Nosotros los nobles,* making it into the top 10, Mexican films gained a market share of over 12%, up from just 5% in 2012 and the highest share in years.

The number of screens grew by 3.5%, up to 5 547 in 2013, 86% of which had been converted by the end of 2013. Although Mexico has the highest ratio of screens per inhabitant in the region (46.9 per million), only 6% of Mexican cities have theatrical facilities, limiting potential cinema-going to slightly more than half the population, indicating further growth potential.

Mexican production activity grew from 83 to 126 feature films in 2013, the highest level since 1959. The average budget for a Mexican production amounted to USD 1.7 million.

Brazil

Cinema attendance grew slightly to a new record high of 149.5 million admissions. Thanks to a further increase in ticket prices, GBO continued to grow faster than underlying admissions for the sixth consecutive year, growing by 11% to BRL 1.6 billion. Measured in terms of USD GBO however declined by 11% to USD 744 million, due to a devaluation of the Real. Led by local comedies *Minha mãe é uma peça* and *De Pernas pro Ar 2* both of which made it into the top 10, Brazilian films captured a market share of 18.6% selling 27.8 million admissions, the best result in the past decade. With a digital screen penetration of about 47% Brazil is somewhat lagging behind other Latin American markets in terms of digitisation.

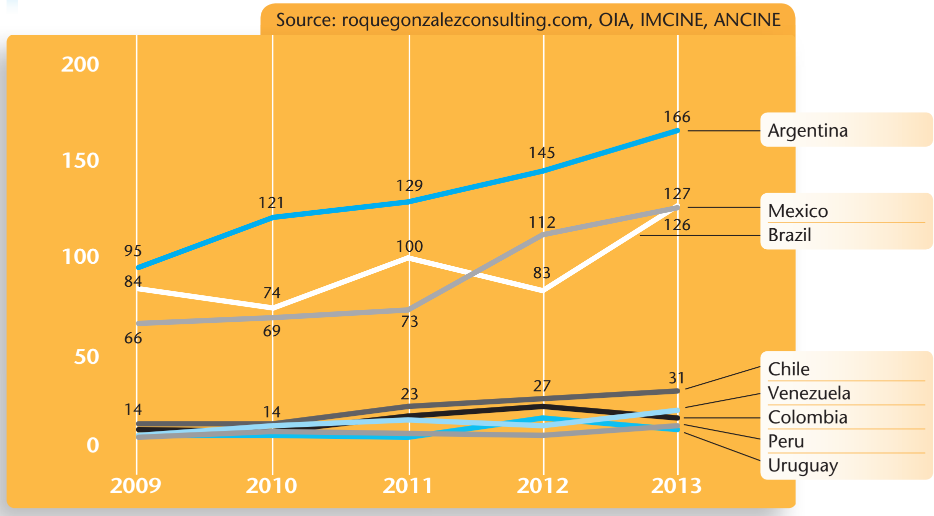
Local film production is booming, with 127 local films released in 2013. This is well above the average yearly production of 93 films over the last 5 years. The Federal Audiovisual Fund, FSA, increased its endowment to total BRL 400 million (USD 170 million), an amount equal to the resources of the fund in the last 4 years together. Furthermore, some new lines of credit were launched, including one to support innovative feature-length film projects, aimed at fostering the local arthouse industry.

Argentina

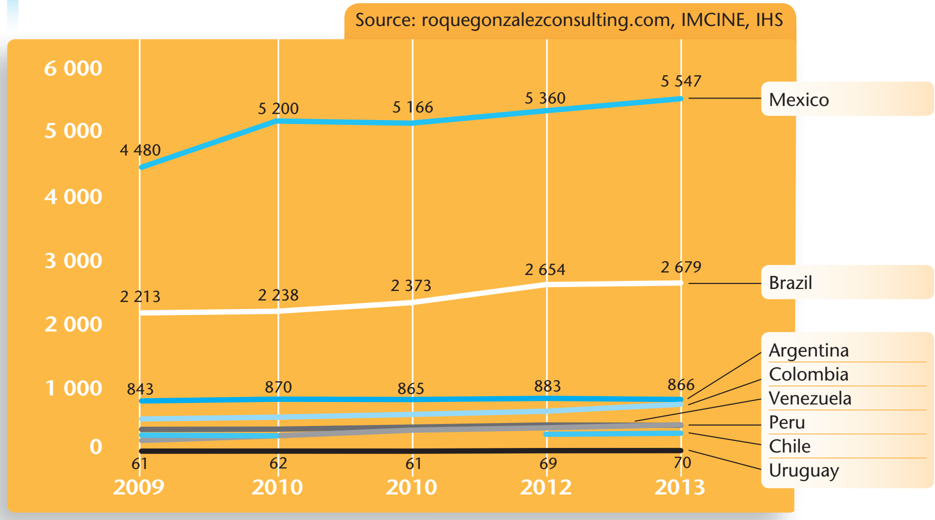
The country has broken attendance records for the second consecutive year, counting 46.1 million admissions in 2013. GBO increased by 1.2% to USD 258 million. With a budget of USD 21 million, 3D animation *Metegol* (Foosball) became the most expensive Argentinian production of all times and the highest-grossing local production of the year. It was followed by romantic comedy *Corazón de León*, accounting together for more than half of the attendance to domestic films. Both films made it into the top 10 and contributed to national market share increasing from 8% to 15%. Argentina was the most prolific producer of the region, with 166 local productions released in 2013. Like in Brazil, digital screen penetration was comparatively low with 48% of the country's 866 screens digitised by the end of 2013.

Sources: roquegonzalezconsulting.com, Observatório Iberoamericano do Audiovisual, INCAA, IMCINE, ANCINE, IHS, *Screen International, Variety,* OBS

Number of national feature films released in Latin America | 2009-2013 e



Number of screens in Latin America | 2009-2013



Top 10 films by admissions in Mexico | 2013 [e]

	Original title	Country of origin	Director	Admissions [e]
1	No se aceptan devoluciones (Instructions Not Included)	MX	Eugenio Derbez	15 190 728
2	Despicable Me 2	US	P. Coffin, C. Renaud	13 402 742
3	Iron Man 3	US/CN	Shane Black	11 805 760
4	Monsters University	US	Dan Scanlon	10 608 764
5	Furious 6	US/ES	Justin Lin	10 161 122
6	The Croods	US	K. De Micco, C. Sanders	7 179 454
7	Nosotros los Nobles	MX	Gary Alazraki	7 136 955
8	World War Z	US	Marc Forster	6 217 462
9	Thor: The Dark World	US	Alan Taylor	5 641 332
10	Man of Steel	US/CA/GB	Zack Snyder	5 180 201

Source: Canacine

Top 10 films by admissions in Brazil | 2013 [e]

	Original title	Country of origin	Director	Admissions [e]
1	Iron Man 3	US/CN	Shane Black	7 633 472
2	Despicable Me 2	US	P. Coffin, C. Renaud	6 989 217
3	Thor: The Dark World	US	Alan Taylor	4 823 275
4	Minha mãe é uma peça (My Mom Is a Character)	BR	André Pellenz	4 600 145
5	Furious 6	US/ES	Justin Lin	4 521 808
6	Wolverine	US/GB	James Mangold	3 955 379
7	De Pernas pro Ar 2 (Head Over Heels 2)	BR	Roberto Santucci	3 787 852
8	Hansel & Gretel: Witch Hunters	DE/US	Tommy Wirkola	3 716 154
9	The Hunger Games: Catching Fire	US	Francis Lawrence	3 533 536
10	Wreck-It Ralph	US	Rich Moore	3 334 365

Source: Ancine

Top 10 films by admissions in Argentina | 2013 [e]

	Original title	Country of origin	Director	Admissions [e]
1	Monsters University	US	Dan Scanlon	3 342 776
2	Despicable Me 2	US	P. Coffin, C. Renaud	2 610 369
3	Metegol (The Unbeatables)	AR/ES	Juan José Campanella	2 113 566
4	Furious 6	US/ES	Justin Lin	2 209 399
5	Iron Man 3	US/CN	Shane Black	1 860 519
6	Corazón de león	AR/BR	Marcos Carnevale	1 704 511
7	World War Z	US	Marc Forster	1 165 446
8	The Croods	US	K. De Micco, C. Sanders	1 298 011
9	Wreck-It Ralph	US	Rich Moore	1 170 189
10	The Conjuring	US	James Wan	1 081 330

Source: Ultracine

Top 10 films by admissions in Chile | 2013 [e]

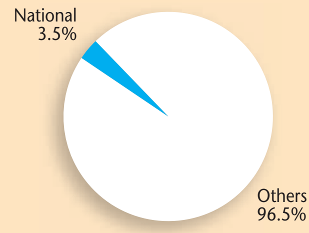
	Original title	Country of origin	Director	Admissions [e]
1	Monsters University	US	Dan Scanlon	1 253 746
2	Iron Man 3	US/CN	Shane Black	1 097 539
3	The Conjuring	US	James Wan	909 297
4	Furious 6	US/ES	Justin Lin	857 979
5	Despicable Me 2	US	P. Coffin, C. Renaud	846 579
6	The Croods	US	K. De Micco, C. Sanders	809 666
7	El ciudadano Kramer	CL	Stefan Kramer	673 415
8	World War Z	US	Marc Forster	581 172
9	Life of Pi	US	Ang Lee	563 231
10	Thor: The Dark World	US	Alan Taylor	532 357

Source: Ultracine

Australia

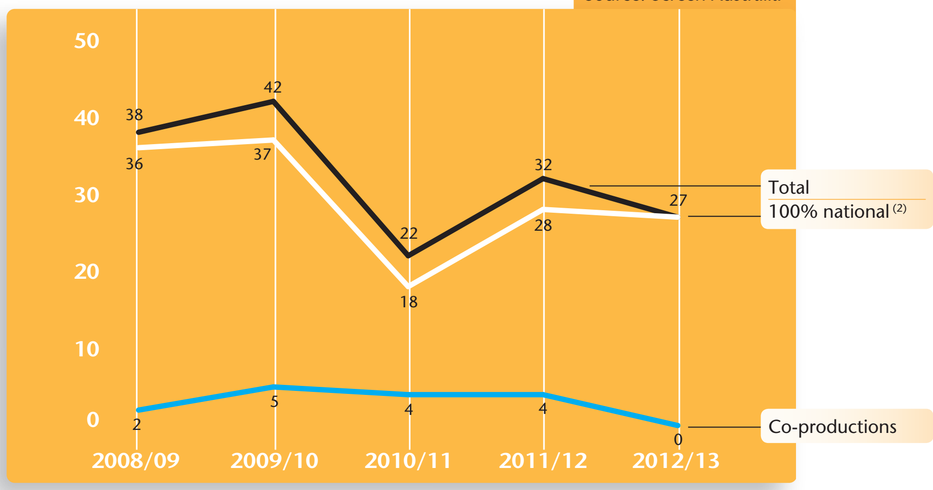
Population 2013 e	23.2 million
GDP per capita 2013 e	64 157 USD
Gross box office 2013	1.10 bn AUD (1.06 bn USD)
Admissions 2013	82.0 million
Average ticket price 2013	13.4 AUD (12.9 USD)
Average admissions per capita 2013	3.5
Screens 2012 I 2013	1 997 I 2 057
Digital screens 2012 I 2013	~ I 1 168
3D screens 2012 I 2013	704 I 916

Market shares 2013 e



Number of Australian feature fiction films produced (1) I 2008/09-2012/13

Source: Screen Australia

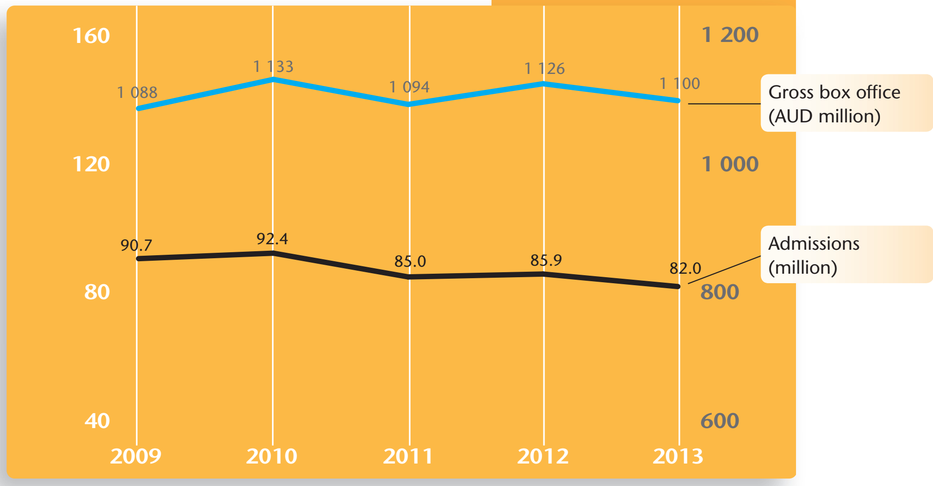


(1) Films with budgets below AUD 0.5 million are only included if they had a theatrical release or major festival screening.

(2) Includes films under Australian creative control that were 100% foreign financed.

Admissions and gross box office I 2009-2013

Source: MPDAA, Screen Australia



Top 20 films by admissions in Australia | 2013 e

Estimated admissions based on average ticket price of AUD 13.4.

	Original title	Country of origin	Director	Distributor	Admissions e
1	Iron Man 3	US/ CN	Shane Black	Walt Disney	2 925 482
2	The Hunger Games: Catching Fire	US	Francis Lawrence	Roadshow	2 711 905
3	Despicable Me 2	US	Pierre Coffin, Chris Renaud	Universal	2 666 332
4	Life Of Pi	US	Ang Lee	Fox	2 109 700
5	The Great Gatsby	AU/US	Baz Luhrmann	Roadshow	2 042 078
6	Furious 6	US/ES	Justin Lin	Universal	2 013 100
7	The Croods	US	K. De Micco, C. Sanders	Fox	1 885 451
8	Man Of Steel	US/CA/GB	Zack Snyder	Warner Bros	1 814 957
9	Monsters University	US	Dan Scanlon	Walt Disney	1 809 280
10	The Hobbit: An Unexpected Journey	US/NZ inc	Peter Jackson	Warner Bros	1 776 518
11	Thor: The Dark World	US	Alan Taylor	Walt Disney	1 716 614
12	Gravity	US/GB inc	Alfonso Cuaron	Warner Bros	1 569 269
13	The Hangover Part III	US	Todd Phillips	Warner Bros	1 566 575
14	Wreck It Ralph	US	Rich Moore	Walt Disney	1 412 242
15	World War Z	US	Marc Forster	Paramount	1 382 156
16	Les Misérables	GB/US	Tom Hooper	Universal	1 367 883
17	The Hobbit: The Desolation Of Smaug	US/NZ inc	Peter Jackson	Warner Bros	1 323 848
18	Now You See Me	US	Louis Leterrier	Eone/Hopscotch	1 283 945
19	Star Trek Into Darkness	US	J.J. Abrams	Paramount	1 216 141
20	Django Unchained	US	Quentin Tarantino	Sony Pictures	1 195 347

Source: MPDAA

Distribution and exhibition

Australia registered a declining box office in 2013 with admissions dropping by 4.5% year-on-year to 82 million, the lowest level since 2000. However, the fall in gross box office was less acute, declining by 2.3% to AUD 1.1 billion, AUD 26 million less than the previous year. For the second consecutive year, ticket prices rose in parallel with the inflation rate, confirming the end of the above-average growth phase boosted by digital and 3D in previous years.

American films dominated the market, getting an even bigger slice of the cake than usual, with 88.1% of total GBO. Australian movies accounted for just 3.5% of the revenues and films from other countries also performed poorly, getting the remaining 8.4% - half the portion attained in 2012. A total of 421 films were released in the country in 2013, 26 of which were local productions. Australian-American co-production *The Great Gatsby* was the only one of them to make it into the top 20 films, becoming the sixth highest grossing local title.

The number of cinema screens increased by 60 new screens to 2 057 by the end of 2013, 1 168 of which had been converted to digital according to figures from MPDAA. This would represent a digital screen penetration rate of only 57%, one of the lowest among the world's major markets.

Production and funding

A total of 27 domestic productions started principal photography in the fiscal year 2012/2013. For the first time in 14 years there were no co-productions in the country; but this does not mean there were no foreign films shot down under – almost a third of the total spend in film production in the territory came from 12 inward productions – including the American blockbuster *The Wolverine* and four Bollywood films. In addition, foreign investors provided 30% of the finance for local pictures; the remainder coming mainly from the producer offset, the film and TV industries and the several government funds. All in all, AUD 359 million were spent in the country thanks to local and foreign productions, of which AUD 110 million came from post-production and VFX projects.

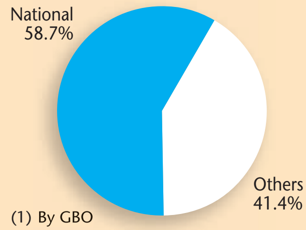
Though as of early 2014 only 2 of the 11 co-production treaties signed by Australia are with Asian countries (China and Singapore), negotiations with Malaysia, India and Korea are underway. Asian productions represented 23.5% of the total number of releases in the country in 2013, a percentage which has almost doubled over the last 5 year.

Source: Screen Australia, MPDAA, *Variety*, *Screen International*, OBS

People's Republic of China

Population 2013 e	1 361 million
GDP per capita 2013 e	6 569 USD
Gross box office 2013 e	21.77 bn CNY (3.54 bn USD)
Admissions 2013 e	612 million
Average ticket price 2013 e	35.6 CNY (5.8 USD)
Average admissions per capita 2013 e	0.4
Screens 2012 I 2013 e	13 118 I 18 195
Digital screens 2012 I 2013 e	12 407 I 17 526
Digital 3D screens 2012 I 2013 e	~ I 11 810

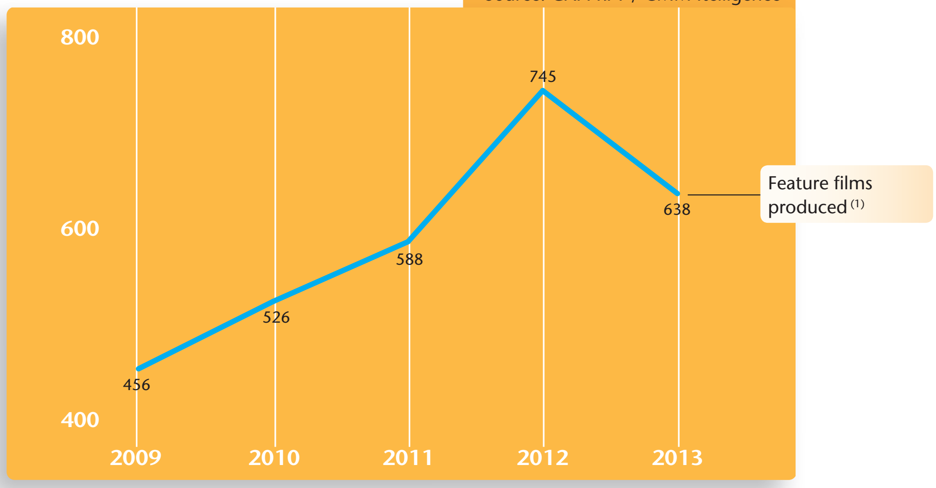
Market shares 2013 [(1)]



(1) By GBO

Number of Chinese feature films produced I 2009-2013

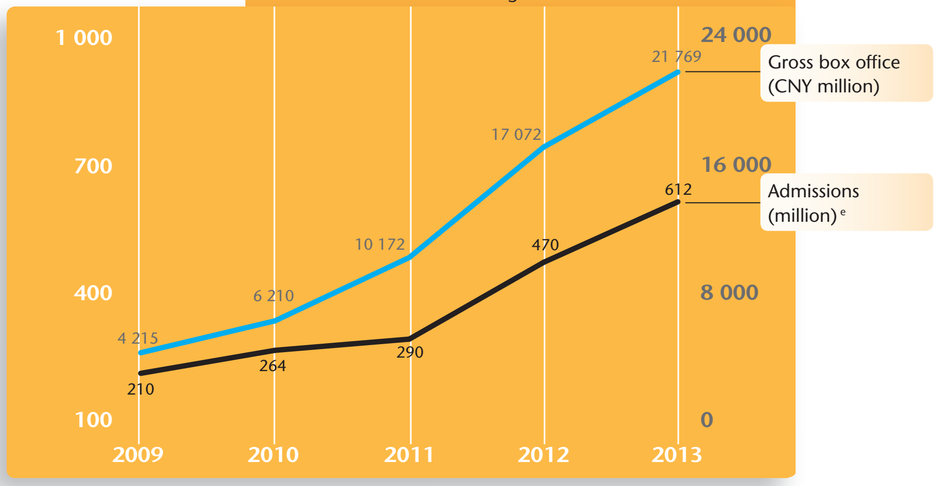
Source: GAPPRFT / CMM Intelligence



(1) Does not include films produced outside the official system of script and final print approval.

Admissions and gross box office I 2009-2013

Source: GAPPRFT / CMM Itelligence/ Screen International / IHS



Top 20 films by gross box office in China | 2013

	Original title	Country of origin	Director	Gross box office (in USD million)
1	Journey to the West: Conquering the Demons	CN	Stephen Chow, Derek Kwok	205.8
2	Iron Man 3	US/CN	Shane Black	116.5
3	So Young	CN	Vicki Zhao	115.8
4	Pacific Rim	US	Guillermo del Toro	114.0
5	Young Detective Dee: Rise of the Sea	CN	Hark Tsui	99.1
6	Personal Tailor	CN	Xiaogang Feng	96.1
7	American Dreams in China	CN	Peter Chan	87.6
8	Finding Mr. Right	CN/HK	Xiaolu Xue	84.3
9	Tiny Times	CN	Jingming Guo	79.3
10	Gravity	US/GB inc	Alfonso Cuaron	72.7
11	Furious 6	US/ES	Justin Lin	67.7
12	The Croods	US	Kirk De Micco, Chris Sanders	65.2
13	Man of Steel	US/CA/GB	Zack Snyder	65.2
14	Skyfall	GB inc/US	Sam Mendes	61.1
15	Star Trek Into Darkness	US	J.J. Abrams	57.8
16	Jurassic Park (3D)	US	Steven Spielberg	57.5
17	Thor: The Dark World	US	Alan Taylor	56.8
18	Police Story 2013	HK/CN	Sheng Ding	56.2
19	G.I. Joe: Retaliation	US	Jon Chu	54.5
20	The Hobbit: An Unexpected Journey	US/NZ inc	Peter Jackson	51.2

Source: SARFT

Distribution and exhibition

The Chinese theatrical market continued its impressive growth trend of recent years. With GBO growing by 27.5% to CNY 21.77 billion (USD 3.54 billion), China further strengthened its position as the world's second largest box office market. Admissions jumped by 30% to 612 million, 142 million more than in 2012.

Box office charts were topped by location action spectacle *Journey to the West: Conquering the Demons*. With six other local productions featuring in the top 10, national market share increased by over 10 percentage points to 58.7% of total GBO, the highest level since 2008.

Most of the quota of 34 foreign films released in the country went to Hollywood sci-fi and action blockbusters like *Iron Man 3* or *Pacific Rim*, the latter grossing higher in China (#5 in local box office charts with a GBO of USD 112 million) than on the North American market. On a cumulative basis foreign films earned around CNY 9 billion (USD 1.46 billion), explaining why foreign producers are trying hard to win over one of the two state-owned distributors, China Film and Huaxia Film, entitled to distribute foreign productions for domestic release, even if that means adding or cutting footage.

The number of cinema screens increased dramatically in 2013, jumping from 13 118 to 18 195. Most of these new screens were built in 2nd and 3rd-tier cities where purchasing power is comparatively low, which also explains the fact that average ticket price decreased slightly for the first time after years of steady growth. 96% of China's screens had been converted to digital by the end of 2013, with 67% of them equipped for 3D projection.

Production and funding

A total of 638 feature films were produced in China in 2013, compared with 745 in 2012. However, only one out of four local productions usually gets a theatrical release.

China continued to expand its production facilities with *Wanda Cinemas* starting the construction of *Qingdao Oriental Movie Metropolis,* a mega studio in the Shandong province which may become the largest production facility in the world on completion in 2017. British Pinewood and local Seven Stars announced plans to establish a network of 8 film schools around the country.

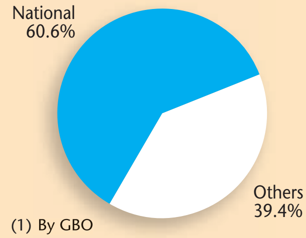
Super-regulator GAPPRFT (General Administration of Press, Publication, Radio, Film and Television) was launched this year, resulting from the merge of the Audiovisual and Press regulators - SARFT and GAPP respectively, aiming at reducing red tape and overlapping areas of competence.

Source: CMM Intelligence, GAPPRFT, *Variety,* IHS, *The Economist*

Japan

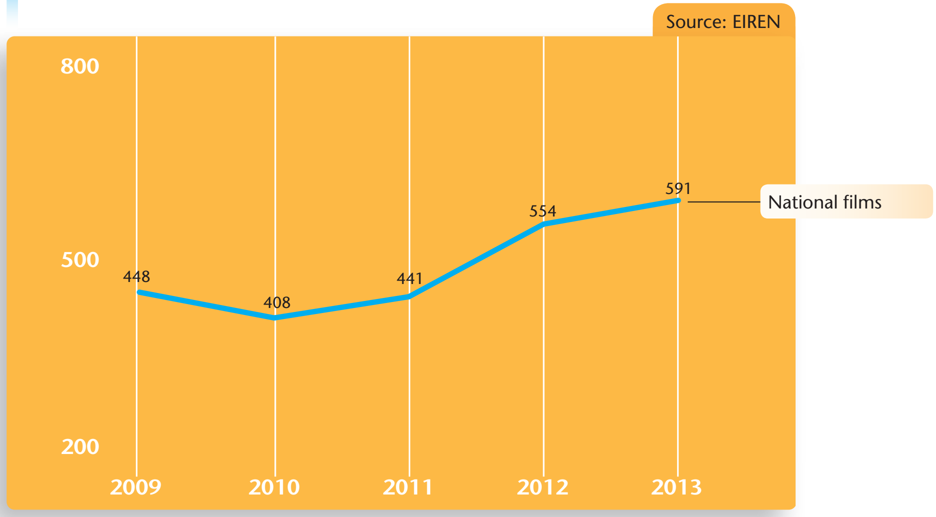
Population 2013 [e]	127.3 million
GDP per capita 2013 [e]	39 321 USD
Gross box office 2013	194.2 bn JPY (2.0 bn USD)
Admissions 2013	155.9 million
Average ticket price 2013	1 246 JPY (12.8 USD)
Average admissions per capita 2013	1.2
Screens 2012 I 2013	3 290 I 3 318
Digital screens 2012 I 2013	2 897 I 3 172
Digital 3D screens 2012 I 2013	1 042 I 1 077

Market shares 2013 [(1)]

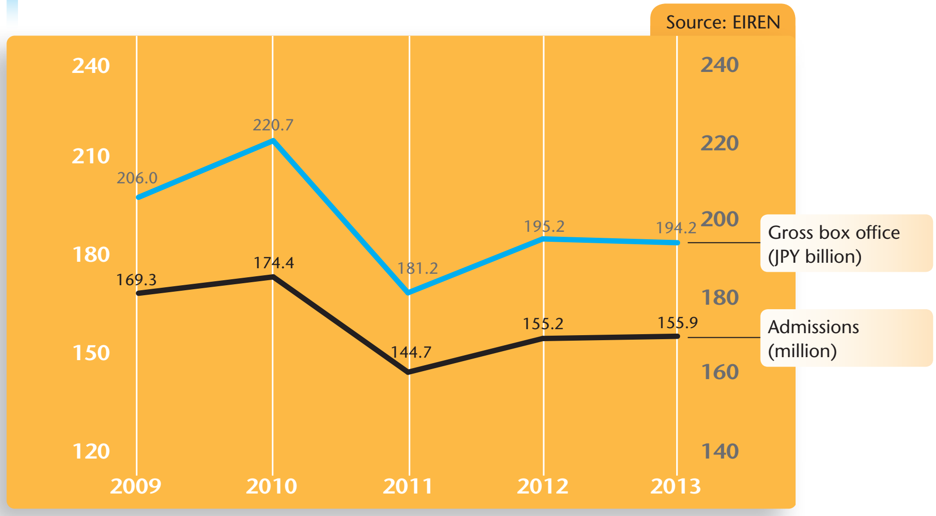


(1) By GBO

Number of Japanese films released | 2009-2013



Admissions and gross box office | 2009-2013



Top 20 films by admissions in Japan | 2013 [e]

Estimated admissions based on average ticket price of JPY 1 246.

	Original title	Country of origin	Director	Distributor	Admissions [e]
1	The Wind Rises	JP	Hayao Miyazaki	Toho	9 646 870
2	Monsters University	US	Dan Scanlon	Wds	7 191 011
3	One Piece Film Z	JP	Tatsuya Nagamine	Toei	5 513 644
4	Les Misérables	GB/US	Tom Hooper	Toho-Towa	4 727 127
5	Ted	US	Seth MacFarlane	Toho-Towa	3 394 864
6	Doraemon the Movie: Nobita's Secret Gadget…	JP	Yukiyo Teramoto	Toho	3 194 222
7	Detective Conan: Private Eye in the Distant Sea	JP	Kobun Shizuno	Toho	2 913 323
8	Midsummer's Equation	JP	Hiroshi Nishitani	Toho	2 656 501
9	The After-Dinner Mysteries	JP	Masato Hijikata	Toho	2 608 347
10	Like Father, Like Son	JP	Hirokazu Koreeda	Gaga	2 568 218
11	Pokémon the Movie: Genesect and the Legend…	JP	Kunihiko Yuyama	Toho	2 544 141
12	Wreck-It Ralph	US	Rich Moore	Wds	2 407 705
13	Dragonball Z: Battle of Gods	JP	Masahiro Hosoda	Toei/Fox	2 399 679
14	The Kiyosu Conference	JP	Kôki Mitani	Toho	2 375 602
15	Spec: Closed - Zen no hen	JP	Yukihiko Tsutsumi	Toho	2 207 063
16	Skyfall	GB inc/US	Sam Mendes	Spe	2 207 063
17	Platinum Data	JP	Keishi Ohtomo	Toho	2 118 780
18	Iron Man 3	US/CN	Shane Black	Wds	2 062 600
19	Despicable Me 2	US	Coffin, Renaud	Toho-Towa	2 006 421
20	The Apology King	JP	Nobuo Mizuta	Toho	1 749 599

Source: EIREN, OBS

Distribution and exhibition

The Japanese theatrical market did not show much movement in 2013. Most indicators present slight year-on-year variations either way: changes in GBO, admissions, average ticket price and attendance per capita can be measured in decimals. Admissions increased marginally by 0.5% to 155.9 million while GBO decreased slightly to JPY 194.2 billion. GBO decline was more pronounced when measured in USD, down from USD 2.45 billion to USD 2.0 billion due to the Bank of Japan devaluation of the Yen against the dollar by almost 20% year on year.

Digital rollout is close to completion, with 96% of Japan's 3 318 screens converted to digital projection systems by the end of 2013, a third of which are 3D enabled.

Animation films were once more particularly attractive to Japanese audiences with seven animation movies among the ten most successful films of the year. Local animation blockbuster *The Wind Rises* topped Japanese charts with another 12 Japanese films making it into the top 20. Cumulatively, local pictures grabbed more than 60% of total GBO.

Not since EIREN started tracking film releases, back in 1955, has Japan had such a diverse offer of films in theatres with 1 117 films released in 2013, up from 983 in 2012. Particularly the number of foreign releases increased from 429 to 526 films. The remaining 591 film releases were national productions. Having said this, the concentration at the top was huge, with 70% of the admissions for domestic films coming from the top 20 Japanese productions.

Production and funding

Japanese production volume reached a new record high with 591 local productions being released in 2012, 37 films more than in 2012.

This year the Government launched the *Cool Japan Fund*, a public-private initiative to support the action of the Creative Industries Promotion Office (created in 2010 within the Ministry of Economy and operating under the *Cool Japan* banner). The fund has been initially endowed with JPY 60 billion, engaging 15 private companies - including major banks Mizuho and Sumitomo Mitsui Trust, which provide 15% of its capital. The Cool Japan Fund aims at increasing exports of Japanese cultural products (including cartoons and films) as part of the wider *manga diplomacy* initiated ten years ago to reinvigorate Japan's soft power in the world, especially in the thriving Asian region. In 2013 Japan and India signed an agreement on co-production of animation films.

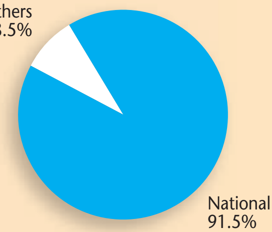
Source: EIREN, UNIJAPAN, *Variety*, IHS, *The Japan Times*

India

Population 2013 e	1 243 million
GDP per capita 2013 e	1 414 USD
Gross box office 2013 e	93.4 bn INR (1.6 bn USD)
Admissions 2013 e	2 697 million
Average ticket price 2013 e	34.6 INR (0.6 USD)
Average admissions per capita 2013 e	2.2
Screens 2012 I 2013 e	11 065 I 11 265
E- & D-Cinema screens (1) 2012 I 2013 e	8 470 I 10 138
3D screens 2012 I 2013 e	~ I ~

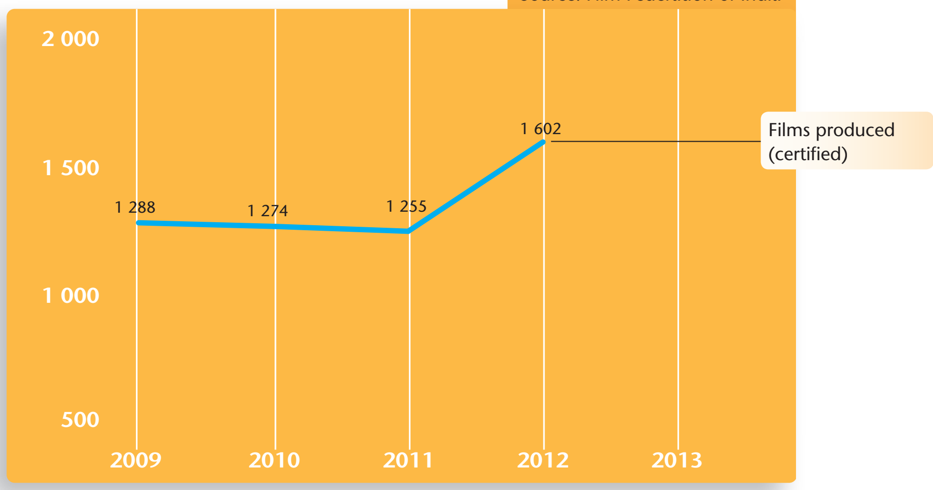
(1) Digital screens not necessarily complying with the d-cinema standards.

Market shares 2012 e



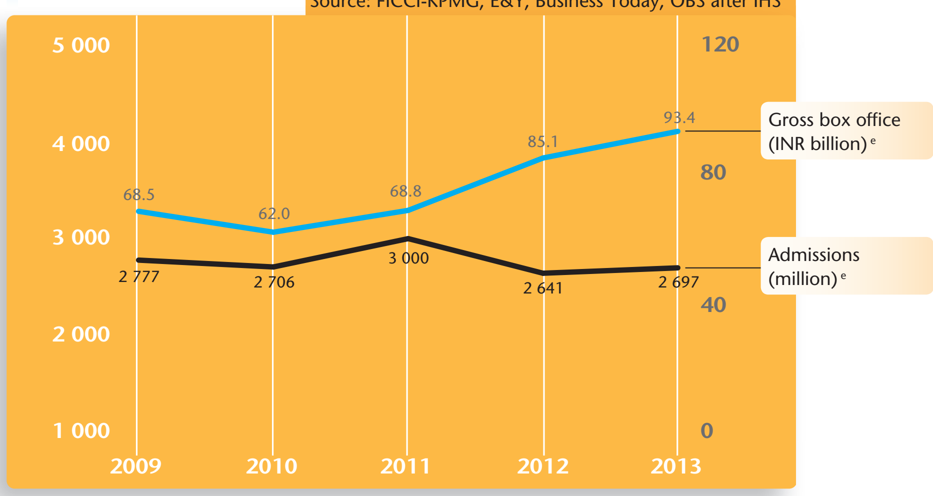
Number of Indian feature films certified I 2009-2012 e

Source: Film Federation of India



Admissions and gross box office I 2009-2013 e

Source: FICCI-KPMG, E&Y, Business Today, OBS after IHS



Top 10 films by GBO in India | 2013

GBO calculated using an average exchange rate of 1 USD = 103.5 INR.

	Original title	Country of origin	Director	Gross box office (in USD million) e
1	Dhoom 3	IN	Vijay Krishna Acharya	27.08
2	Krrish 3	IN	Rakesh Roshan	23.24
3	Chennai Express	IN	Rohit Shetty	21.90
4	Yeh Jawaani Hai Deewani	IN	Ayan Mukerji	18.36
5	Ramleela	IN	Sanjay Leela Bhansali	10.63
6	Bhaag Milkha Bhaag	IN	Rakeysh Omprakash Mehra	10.00
7	Grand Masti	IN	Indra Kumar	9.90
8	Race 2	IN	Abbas Burmawalla, Mustan Burmawalla	9.86
9	Aashiqui 2	IN	Mohit Suri	8.25
10	Special 26	IN	Neeraj Pandey	6.76

Source: Koimoi.com

Top 10 US films by GBO in India | 2013

GBO calculated using an average exchange rate of 1 USD = 103.5 INR.

	Original title	Country of origin	Director	Gross box office (in USD million) e
1	Iron Man 3	US/CN	Shane Black	6.44
2	Furious 6	US/ES	Justin Lin	5.54
3	Man of Steel	US/CA/GB	Zack Snyder	3.57
4	Gravity	US/GB inc	Alfonso Cuaron	3.51
5	The Wolverine	US/GB	James Mangold	2.72
6	G.I.Joe: Retaliation	US	Jon Chu	2.22
7	Thor: The Dark World	US	Alan Taylor	2.19
8	The Conjuring	US	James Wan	2.14
9	World War Z	US	Marc Forster	1.71
10	A Good Day to Die Hard	US	John Moore	1.20

Source: KPMG

Distribution and exhibition

The Indian box office has shown an upward trend for three consecutive years, growing by 9.8% year on year, up to INR 93.4 billion in 2013. The rise in ticket prices and the unveiling of new screens (around 200 in 2013, mainly in tier II and III cities) are responsible for this growth. KPMG's forecast for the next 5 years shows an even higher growth rate, with GBO expected to surpass INR 160 billion by 2018. In other words, India is most likely to become the third world market by GBO before the end of the decade.

The heterogeneity of the theatrical venues is reflected by the huge difference between ticket prices at low-end single-screen theatres (USD 1) and high-end multiplexes (USD 4). Although local sources reported a digital penetration above 95% in 2013, it is unclear according to which digital standards the figures are calculated; IHS reported 1 932 d-screens in the country in 2013, that is 17% of total screens. The scope for growth is enormous as India remains significantly underscreened - 9 screens per million inhabitants, 7 times lower than the EU average. This has not prevented blockbusters from having wider releases than ever, with up to 4 500 screens compared to just 1 000 four years ago.

Production and funding

Production broke recent records with 1 602 local films certified in 2012, reversing a slight downward trend since a peak of 1325 films in 2008. However, Bollywood follows a different pattern, showing a decrease in its production volume (221 films in 2012), resulting from a higher concentration of resources; budgets are on the rise, mainly due to higher investment in pre-production and marketing, which in turn is generating more revenues for India's production powerhouse. In addition, production cost has increased between 15% to 30% over recent years.

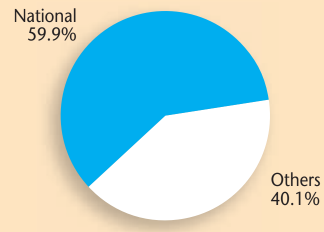
Although Hindi-language films continue to get the lion's share of the local box office, they have been outnumbered, for the first time, by the booming cinema industries in South India. Telugu and Tamil language productions surpassed the figure of 250 films each in 2012. This did not come out of the blue, as Mumbai majors are now heading south - often hand in glove with American studios, in order to fully unleash the potential of the non-Hindi local industry and market.

Source: KPMG, FICCI, Ernst & Young, *Variety*, *The Times of India*, IHS, OBS

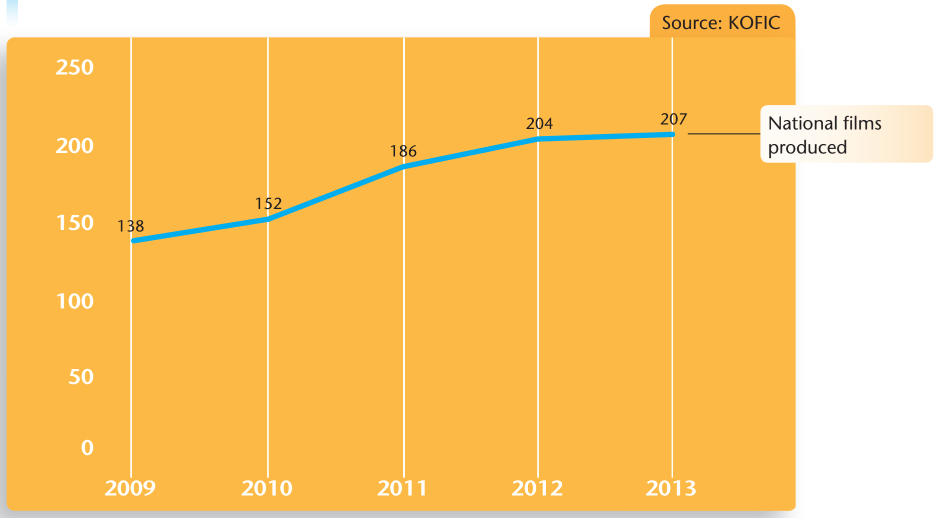
South Korea

Population 2013 e	50.2 million
GDP per capita 2013 e	23 838 USD
Gross box office 2013	1 551 bn KRW (1.42 bn USD)
Admissions 2013 e	213.3 million
Average ticket price 2013 e	7 271 KRW (6.6 USD)
Average admissions per capita 2013 e	4.2
Screens 2012 I 2013	2 081 I 2 184
Digital screens 2012 I 2013	1 948 I 2 184
Digital 3D screens 2012 I 2013	830 I 859

Market shares 2013 e

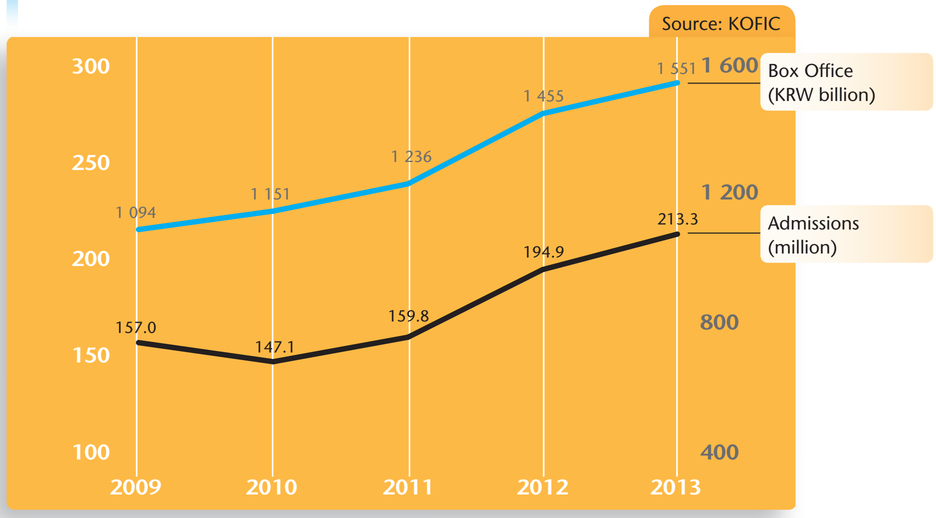


Number of Korean feature films produced I 2009-2013 (1)



(1) Restated series.

Admissions and gross box office I 2009-2013



Top 20 films by admissions in South Korea | 2013

	Original title	Country of origin	Director	Distributor	Admissions
1	Miracle in Cell No. 7	KR	Lee Hwan-kyung	Next Entert. World	12 810 515
2	Snowpiercer	KR/US/FR/CZ	Joon-ho Bong	CJ Entertainment	9 341 572
3	The Face Reader	KR	Jae-rim Han	Showbox/Mediaplex	9 134 386
4	Iron Man 3	US/CN	Shane Black	Sony Pict./Walt Disney	9 001 309
5	The Berlin File	KR	Seung-wan Ryoo	CJ Entertainment	7 166 268
6	Secretly Greatly	KR	Chul-soo Jang	Showbox/Mediaplex	6 959 083
7	The Attorney	KR	Woo-seok Yang	Next Entert. World	5 686 852
8	Hide and Seek	KR	Jung Huh	Next Entert. World	5 604 104
9	The Terror, LIVE	KR	Byeong-woo Kim	Lotte Entertainment	5 579 586
10	Cold Eyes	KR	Ui-seok Jo, Byung-seo Kim	Next Entert. World	5 506 770
11	World War Z	US	Marc Forster	Lotte Entertainment	5 604 104
12	New World	KR	Hoon-jung Park	Next Entert. World	5 579 675
13	Man on the Edge	KR	Jin-gyu Cho	Showbox/Mediaplex	5 506 770
14	Spy: Undercover Operation	KR	Lee Seung-jun	CJ Entertainment	5 237 519
15	Gravity	US/GB inc	Alfonso Cuaron	Warner Bros	4 682 418
16	The Tower	KR	Ji-hoon Kim	CJ Entertainment	3 893 216
17	The Flu	KR	Sung-soo Kim	CJ Entertainment	3 435 596
18	Thor: Dark World	US	Alan Taylor	Sony Pict./Walt Disney	3 194 698
19	Red 2	US/FR/CA	Dean Parisot	Lotte Entertainment	3 166 425
20	Friend: The Great Legacy	US/KR	Kwak Kyung-taek	Lotte Entertainment	3 118 847

Source: KOFIC

Distribution and exhibition

The South Korean box office has broken all records for two consecutive years. Attendance grew by 9.5% on 2012 (6.6% by GBO), to reach 213.3 million admissions.

217 local productions (183 were first releases) accounted for 59.9% of the total admissions. Box office #2, English-language local production *Snowpiercer* (entirely shot in the Czech Republic with a Hollywood crew) was responsible for the sharp growth (by 83.7% on previous year) of Korean cinema exports, amounting to USD 37 million in 2013. Only 5 foreign productions made it into the top 20 list by admissions. American (35.5%), European (3.3%) and Japanese films (0.9%) followed Korea in the attendance ranking by production country.

The number of screens has experienced ebbs and flows in recent times, but for the last two years it has increased at a pace of 100 screens a year. In addition, the country reached full digitisation this year. With all these figures, it comes as no surprise that Korea entered the exclusive club of countries with attendance per capita above 4 (4.24 admissions/capita in 2013).

Within the context of KOFIC's task force for the promotion of the post-theatrical film market, and in an unprecedented exercise of transparency, the institution signed an agreement with four leading national IPTV and cable operators to unveil their statistics on film VoD consumption. The foreseen extension of the project to other providers should make possible nation-wide statistics on the number of viewings and revenue per film.

Production and funding

2013 saw 207 features produced, just a 1.5% increase on 2012 but 120 more films than a decade ago. However, part of the industry is ringing warning bells about the growing gap between high and low end local productions. Major production companies are increasingly concentrating resources on mainstream films which get wider and wider releases (up to 800 screens) – the top 15 Korean films at the box office accounted for 75% of the admissions for local films in 2013. In turn, local lower budget productions, although more numerous than ever before, have less access to screening space, and seem to be heading toward marginality, with most Korean productions grabbing less than 10 000 admissions.

Collective bargaining brought a series of improvements in working conditions for film crews, including new standards for minimum wages within the industry. This year Korea signed two memoranda of co-operation with China and Estonia.

Source: Korean Film Council (KOFIC), *Screen International*, OBS

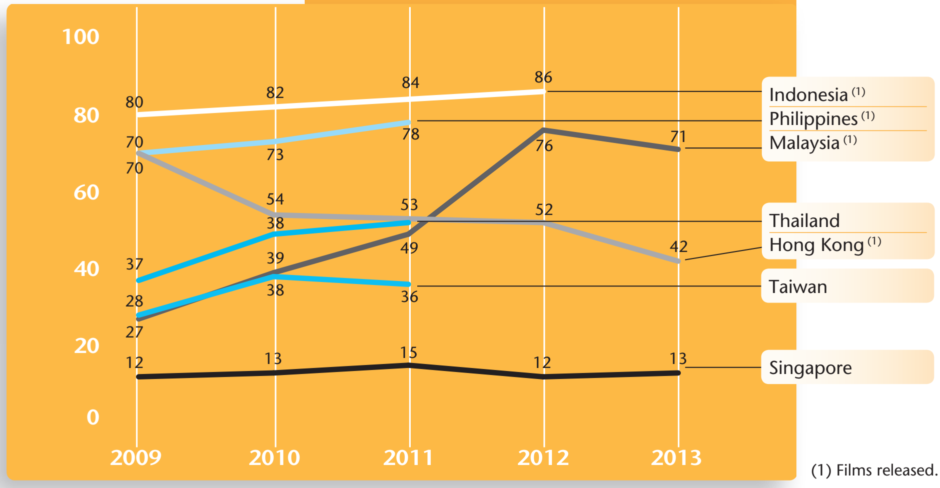
Other Asia

	Hong Kong	Indonesia	Malaysia	Philippines	Singapore	Taiwan	Thailand
Population 2013 e (million)	7.2	248.0	30.0	97.5	5.4	23.4	68.2
GDP per capita 2013 e (USD)	38 605	3 499	10 429	2 792	52 918	20 706	5 879
Gross box office 2013 e (M USD)	209.5	156.3 (1)	210.0	163.3 (1)	148.3 (1)	242.4 (1)	119.3 (1)
Admissions 2013 e (million)	24.3 (1)	55.38 (1)	61.0	75.95 (1)	22.1	23.9 (1)	24.95 (1)
Average ticket price 2013 e (USD)	8.3 (1)	2.8 (1)	3.4	2.2 (1)	7.0 (1)	10.1 (1)	4.8 (1)
Average admissions per capita 2013 e	3.4 (1)	0.2 (1)	2.0	0.8 (1)	3.9 (1)	1.0 (1)	0.4 (1)
Screens 2013 e	222	> 842	774	703 (1)	> 215	> 636	846 (1)
Digital screens 2013 e	222	842	774	575	215	636	816
Digital 3D screens 2013 e	193	387	239	138	91	399	381
National market shares 2013 e	21.7%	~	13.2%	25.7% (2)	~ 4%	17.5%	~

(1) 2012 (2) 2011

Number of feature films produced by selected Asian countries | 2009-2013

Source: OBS, Taiwan Cinema, Singapore Film Commission, Screen International, Finas, Hong Kong Express, IHS

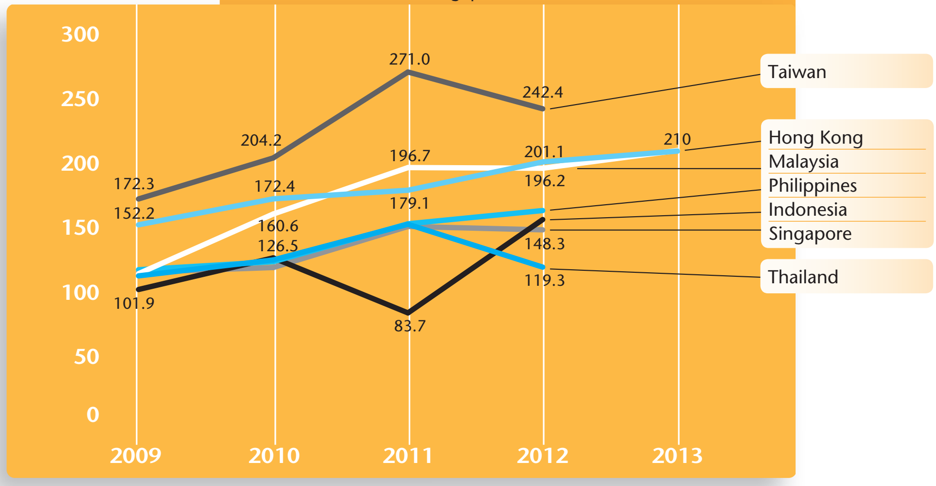


(1) Films released.

Gross box office in selected Asian countries | 2009-2013 e

In USD million. Local currencies converted at average annual exchange rates.

Source: OBS, IHS, Finas, Singapore Film Commission, Taiwan Cinema



Top 10 films by gross box office in Hong Kong | 2013

	Original title	Country of origin	Director	Gross box office (in USD million) [e]
1	Iron Man 3	US/CN	Shane Black	13.72
2	Monsters University	US	Dan Scanlon	9.98
3	Unbeatable	HK/CN	Dante Lam	5.75
4	World War Z	US	Marc Forster	5.49
5	Thor: The Dark World	US	Alan Taylor	4.73
6	Man of Steel	US/CA/GB	Zack Snyder	4.29
7	Despicable Me 2	US	Pierre Coffin, Chris Renaud	4.20
8	Pacific Rim	US	Guillermo del Toro	4.09
9	The White Storm	HK/CN	Benny Chan	3.91
10	A Good Day to Die Hard	US	John Moore	3.70

Source: Screen International

Top 10 films by gross box office in Singapore | 2013 [e]

	Original title	Country of origin	Director	Gross box office (in USD million) [e]
1	Iron Man 3	US/CN	Shane Black	10.21
2	Ah Boys to Men 2	SG	Jack Neo	6.36
3	Thor: The Dark World	US	Alan Taylor	6.29
4	Despicable Me 2	US	Pierre Coffin, Chris Renaud	5.65
5	Man of Steel	US/CA/GB	Zack Snyder	5.02
6	Furious 6	US/ES	Justin Lin	4.71
7	The Hunger Games: Catching Fire	US	Francis Lawrence	4.59
8	G.I. Joe: Retaliation	US	Jon Chu	4.26
9	The Wolverine	US/GB	James Mangold	3.88
10	Pacific Rim	US	Guillermo del Toro	3.87

Source: The Hollywood Reporter

Distribution and exhibition

Asia is the highest growing region in the world; and its film sector is no exception. For the first time ever, the Asia-Pacific region overtook Europe-Middle East by GBO and number of screens. Although nothing can compare to China - neither by size, nor growth or potential, this is not the only thriving market in the region.

With a population similar to the United States and Russia combined, the 7 *smaller* markets analysed are worth the GBO of Germany, representing a level of admissions equivalent to Italy and Spain combined. Among them, developing countries such as Indonesia, the Philippines, Vietnam and Thailand have in their young, fast-growing population a recipe for the exhibition sector to unleash its potential in the years to come. More so if we consider the very low attendance per capita levels. A boom similar to the Chinese, on a lower scale, would not be a surprise given the extraordinary prospects of GDP growth (up to 40% in the case of Vietnam) for the next 5 years. Even highly developed territories like Singapore or Hong Kong experienced year-on-year growth at the box office. In addition, Malaysia and Hong Kong achieved full digitisation in 2013.

Production

Production remained steady in Malaysia and Singapore. In turn, local releases gained a higher share of the market (21.7%) in Hong Kong, with 20% fewer films released than the year before. Local productions *Unbeatable* and *The White Storm* made it to the box office top 10. Singaporean comedy sequel *Ah Boys to Men 2* outperformed the first instalment, ranking #2 in the local box office list. Thai comedy-horror film *Pee Mak* topped the local chart, breaking all records by grossing USD 35 million in Asia and becoming the biggest local success of all times by a landslide at home.

Thailand attracted 53 inward investment feature film productions in 2013, 18 more than the previous year. However, its position as top film location in the region is far from being a done deal; the government has been urged to approve financial incentives for foreign producers to remain competitive with its Malaysian neighbour, which is currently offering a 30% rebate. Furthermore, state-of-the-art Pinewood Iskandar Malaysia Studios will be completed by the end of 2014.

Source: MPIA, FINAS, MPAA, Taiwan Cinema, IHS, *Screen International*, *Variety*, *Film Business Asia*, OBS

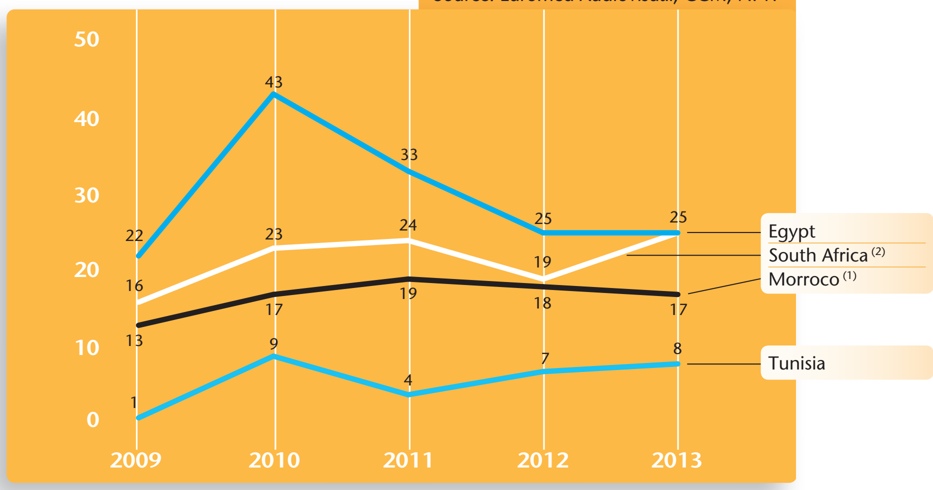
Africa

	Algeria	Egypt	Morocco	South Africa	Tunisia
Population 2013 e (million)	38.1	84.2	32.9	51.7	10.9
GDP per capita 2013 e (USD)	5 668	3 114	3 190	6 847	4 431
Gross box office 2013 e (in M USD)	0.0 (4)	52.8 (1)	8.9	90.8	~
Admissions 2013 e (million)	0.0 (4)	21.4 (1)	1.8	25.8 (2) e	0.3 (5)
Admissions per capita 2013 e	0.0 (4)	0.25 (1)	0.1	0.5 (2)	0.0 (5)
Average ticket price 2013 e (in USD)	0.7 (4)	2.5 (1)	5.0	2.6 (2)	2.3 (4)
Screens 2013 e	17 (1)	399 (1)	70 (1)	865 (2)	19 (1)
Digital screens 2013 e	~	105	39	672	3 (4)
National market shares 2013 e	~	80% (1)	40%	11.2% (6)	~

(1) 2012 (2) 2011 (3) 2010 (4) 2009 (5) 2008 (6) By GBO

Number of feature films produced by selected African countries | 2009-2013

Source: Euromed Audiovisual, CCM, NFVF

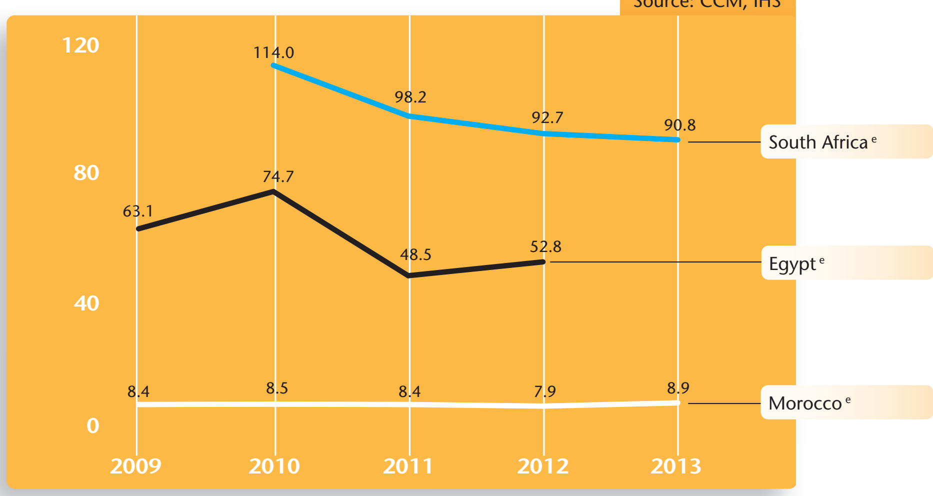


(1) Shooting permits issued by CCM. (2) Films released.

Gross box office in selected African countries | 2009-2013 e

In USD million.

Source: CCM, IHS



Top 10 films by gross box office in South Africa | 2013

	Original title	Country of origin	Director	Distributor	Gross box office (in USD)
1	Despicable Me 2	US	Pierre Coffin, Chris Renaud	UIP	4 131 256
2	Furious 6	US/ES	Justin Lin	UIP	3 830 196
3	Iron Man 3	US/CN	Shane Black	Ster Kinekor	3 356 039
4	Frozen	US	Chris Buck, Jennifer Lee	Ster Kinekor	3 037 126
5	Schuks! Your Country Needs You	ZA	Gray Hofmeyr	Ster Kinekor	2 769 863
6	Mandela: Long Walk to Freedom	GB/ZA	Scott Speer	UIP	2 374 420
7	The Smurfs 2	US	Raja Gosnell	Ster Kinekor	2 266 100
8	Thor: The Dark World	US	Alan Taylor	Ster Kinekor	2 246 837
9	The Hobbit: The Desolation of Smaug	US/NZ inc	Peter Jackson	Nu Metro	2 103 007
10	The Croods	US	Kirk De Micco, Chris Sanders	Nu Metro	2 093 604

Source: NFTF

Top 10 films by gross box office in Morocco | 2013

	Original title	Country of origin	Director	Gross Box Office (in USD) e
1	Zero	MA	Noureddine Lakhmari	140 993
2	Road To Kaboul	MA	Brahim Chkiri	97 003
3	Les Chevaux De Dieu	MA	Nabil Ayouch	93 718
4	Youm Ou Lila	MA	Naoufel Berraoui	53 907
5	Al Bayra	MA	Mohamed Abderrahmane Tazi	50 933
6	Aala Jotiti	EG	Mohamed Bakir	47 120
7	Furious 6	US/ES	Justin Lin	39 625
8	Malak	MA	Abdeslam Kelai	34 979
9	Rock The Casbah	MA	Laila Marrakchi	33 833
10	Sara	MA	Said Naciri	32 575

Source: Centre Cinématographique Marocain (CCM)

Morocco and Egypt

Moroccan GBO grew for the second year in a row (by 8.2% in 2013) despite the drop in admissions (by 10.9%). In fact, current attendance figures are two times lower than six years ago. Skyrocketing ticket prices, which doubled over that same period, have made up for the drain of cinemagoers. 21 feature films were funded with USD 7.1 m. by the CCM in 2013. The institution also started a scheme for the digitization of cinemas. For the first time on record, local productions took the lead in terms of admissions (40%); however, American productions remained ahead by GBO (44%). 2013 saw Morocco becoming the first non-European member to join the European Audiovisual Observatory. The turmoil in Egypt forced the organizers of the Cairo Film Festival, the only *A-festival* in the Arab world, to put it off until 2014. In turn, the shortening of the army-imposed curfew in the capital allowed several productions to resume shooting after a violent summer.

South Africa

Despite what figures in USD may show, GBO grew above average - by 11% year on year; an increasingly adverse exchange rate of the rand against the dollar being responsible for this statistical mirage. 25 of the more than 200 titles released in the country were South African films. Mainstream comedy *Schuks! Your Country Needs You* and biopic *Mandela: Long Walk to Freedom* were the 2 local productions that made it to the top 10 BO list. Together they grossed more than USD 5 million, around half the BO for local films in 2013. Most local titles were shot in Afrikaans and English, but production in Zulu and other indigenous languages is on the up. With the accent on film facilities, incentives and promotion, the country is not hiding aspirations to become a shooting hub for foreign productions. Digitisation made a gigantic step forward with a 312% growth on 2012.

Nigeria

According to government figures, the country has overtaken South Africa as the continent's largest economy. The West African country is the second largest film producer in the world by number of productions; that is, understanding film in the broadest sense of the term, as most titles are no-budget *guerrilla* productions with few commercial perspectives, let alone a theatrical release. Nonetheless, Nollywood has found a new source of revenues in video and on-demand services thanks to the Nigerian diasporas, mainly in UK and the USA.

Source: CCM (Moroccan Cinema Centre), NFVF, Euromed Audiovisual, *Variety, Ventures Africa,* OBS

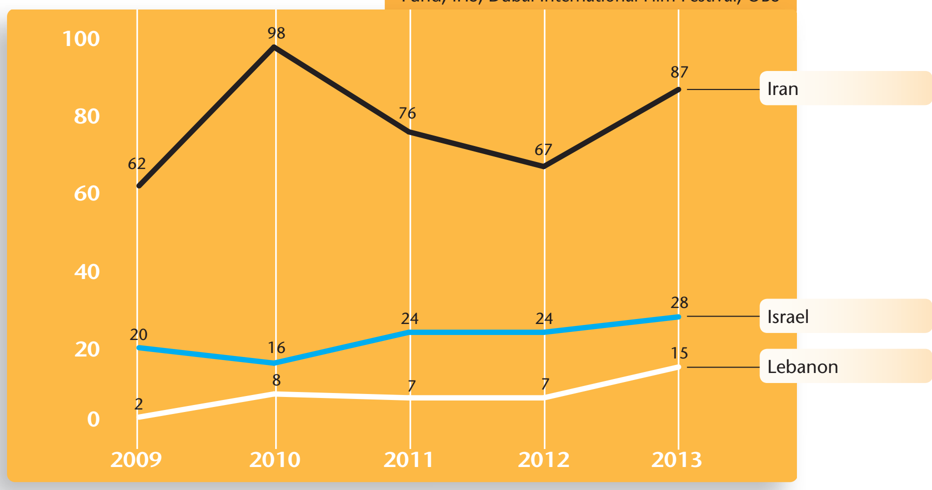
Middle East

	Iran	Israel	Kuwait	Lebanon	Qatar	United Arab Emirates
Population 2013 e (million)	77.1	7.9	3.9	4.1	1.9	9.0
GDP per capita 2013 e (USD)	5 039	34 651	47 829	10 708	104 655	43 184.84
Gross box office 2013 e (in M USD)	11.9	129.7	49.9	26.3	25.6	145.4
Admissions 2013 e (million) e	6.5	14.0	4.2	3.3	2.4	12.9
Admissions per capita 2013 e	0.1	1.8	1.1	1	1.3	1.4
Average ticket price 2013 e (USD)	1.8	9.3	11.78	8.00	10.63	11
Screens 2013 e	353	390	62 (1)	127 (1)	37 (1)	294 (1)
Digital screens 2013 e	162	390	~	~	~	311
National market shares 2013 e	99.0%	10%	~	~	~	~

(1) 2012

Number of films produced by selected Middle Eastern countries | 2009-2013 e

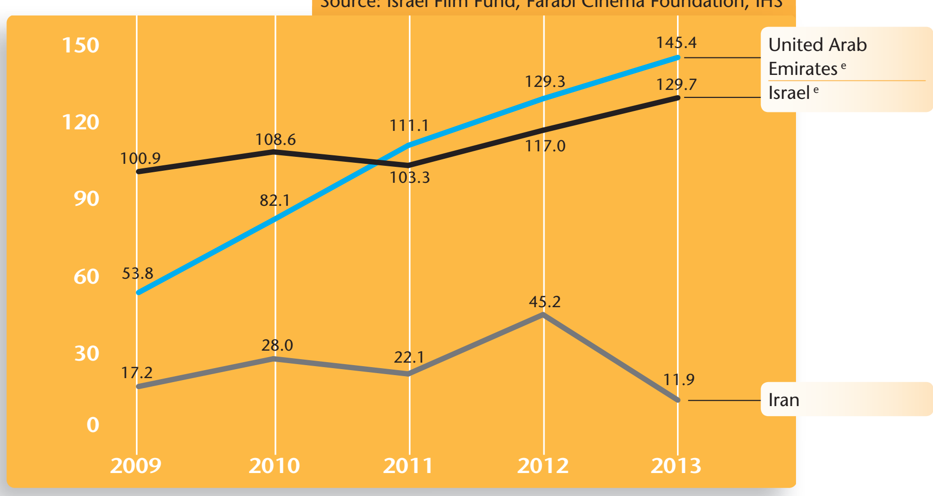
Source: Farabi Cinema Foundation, Israel Film Fund, IHS, Dubai International Film Festival, OBS



GBO in selected Middle Eastern countries | 2009-2013 e

In USD million. Local currencies converted at average annual exchange rates.

Source: Israel Film Fund, Farabi Cinema Foundation, IHS



Top 10 films by admissions in Lebanon | 2013

	Original title	Country of origin	Director	Distributor	Admissions
1	Habbet Loulou	LB	Layal M. Rajha	Shadoof P	126 362
2	Furious 6	US/ES	Justin Lin	Universal	103 546
3	Helwe Ktir W Kezzabi	LB	Seif El Cheikh Nagib	OTH	99 145
4	Bébé	LB	Eli F. Habib	EAG	95 159
5	Despicable Me 2	US	Pierre Coffin, Chris Renaud	Universal	93 103
6	Smurfs 2	US	Raja Gosnell	Columbia	92 937
7	Ghadi	LB	Amin Dora	OTH	77 075
8	Escape Plan	US	Mikael Håfström	Jaguar	75 936
9	Iron Man 3	US/CN	Shane Black	Walt Disney	64 661
10	A Good Day to Die Hard	US	John Moore	Fox	64 211

Source: Empire Cinemas

Overview

The Middle East is one of the most heterogeneous regions in the world and the cinema industry is not an exception. The three main markets, UAE, Israel and Iran, have three different languages and none of them can claim to be the leading industry in the region, as most local films are limited to their domestic markets. The Emirates recently became the leading market by GBO in the Middle East, closely followed by Israel – the #1 by admissions in 2013. In turn, Iran had the highest production levels. Only American films seem to be a constant throughout the region, with the exception of Iran, where foreign releases are quite marginal. In a different league, Egyptian films are also regularly present in the Arab-speaking countries.

Israel

After a rather stable period, with attendance around 10 million admissions a year, box office and admissions grew for the second year in a row. More importantly 2013 saw 1 million more tickets sold than the previous year. After underperforming in 2012, domestic productions seem to be getting back on track again, reaching a double-digit share of the market - more in line with recent years' results. However, the box office top 10 was monopolized by American productions.

Furthermore, the country achieved full digitalization, with half its screens being 3D-capable. Production grew slightly from 24 films in 2012 to 28 this year. At the beginning of 2014, the Israeli government and Jerusalem city council announced the creation of a grant worth ISR 22 million (USD 6.28 million) to attract international productions to the city.

United Arab Emirates

The attendance trend is upward again for the UAE - by almost 10% year on year, after admissions dropped for the first time in recent times in 2012. After years of ticket prices growing between 20% and 30% a year, they only increased by 2.3% on 2012 -an indicator that the exhibition market has matured. A combination of this skyrocketing growth in ticket prices and admissions (by an average 13% a year over the last 10 years) have caused Emirati GBO to triple within the last 5 years, collecting USD 145 million in 2013.

The vast majority of the 264 films on release in the country were American productions. One has to go down in the BO list by admissions to find the 17 Arab-language films (mainly Egyptian productions) and 3 Bollywood blockbusters. Strict censorship continues to be a concern for part of the local and foreign industry, standing in the way of Dubai's and Abu Dhabi's efforts to attract international co-productions to shoot in the country.

Iran

According to official figures by the Farabi Cinema Foundation, attendance seems to be in free-fall for the second year in a row, with admissions dropping by 13% on 2012, down to 6.5 million tickets. The dramatic devaluation of the Rial in 2013 by more than 50% can certainly explain part of this drain. However, an independent source – Iranian Independents, calculated 9 million admissions in 2013, well in line with the results the year before.

2013 saw 87 films produced in Iran, 20 more than the previous year. As usual, foreign films got a marginal 1% of the box office; according to Iranian Independents only 2 of the 58 films theatrically released in the country that year were foreign productions. Although the number of screens stayed stable, digitization reached a 46% penetration rate.

Source: Empire Cinemas, Farabi Cinema Foundation, Iranian Independents, Israel Film Fund, Cinema Industry Association of Israel, *Variety*, IHS, OBS

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FOCUS 2014 was prepared by the European Audiovisual Observatory. We would like to thank the following sources:

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