



MARCHÉ DU FILM
FESTIVAL DE CANNES



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2024

Marché du Film

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WORLD FILM MARKET TRENDS
TENDANCES DU MARCHÉ MONDIAL DU FILM



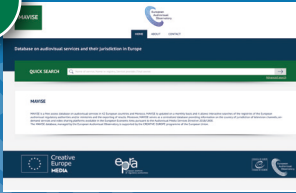
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1



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2



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3



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4



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5



AVMSDatabase

Database on the transposition of the AVMS Directive into national legislation

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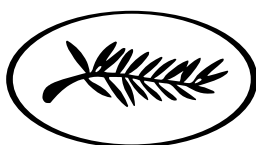
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World Film Market Trends

Tendances du marché mondial du film



Observatoire européen de l'audiovisuel
European Audiovisual Observatory
Europäische Audiovisuelle Informationsstelle



MARCHÉ DU FILM
FESTIVAL DE CANNES



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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.

Editorial

Throughout the years, the *FOCUS* has become the reference guide for professional attendees. Not only does it help grasp the changing practices of the film industry, but it also provides specific information on production and distribution around the world. In these changing times for the whole film industry, the Marché du Film is proud to be in Cannes and to continue to provide these clear data and key trends that are more important than ever to understand. Special thanks to Susanne Nikoltchev and her team, with whom we have worked to provide this invaluable insight into the world of film market trends.

Guillaume Esmiol

Executive Director
Marché du Film

This year, the release day of the 2024 edition of *FOCUS on World Film Market Trends* falls on May 17th, the International Day Against Homophobia. What is a pure coincidence can still remind us that films from all over the world show life in all its facets, mainstream or not, and are much more than just a market factor.

But it is economics that drive the film market and solid market data are helping along. As every year the Observatory provides them in the form of the *FOCUS* that rests on two pillars: the support of the EFARN network and the partnership with the Cannes Marché du Film.

Rest assured that the editors of this publication are both enthusiastic about the variety of film content and experts in analysing how this content reflects on market trends.

Susanne Nikoltchev

Executive Director
European Audiovisual Observatory

Au fil des ans, le *FOCUS* est devenu un ouvrage de référence pour les professionnels. Non seulement il permet de saisir l'évolution des pratiques de l'industrie cinématographique, mais il fournit également des informations spécifiques sur la production et la distribution au niveau mondial. En cette période de mutation qui touche l'ensemble du secteur, le Marché du Film est heureux d'être à Cannes pour fournir des données claires et pointer les tendances clés, dont la compréhension s'avère plus cruciale que jamais. Nous remercions tout particulièrement Susanne Nikoltchev et son équipe, avec qui nous avons collaboré pour produire ce précieux panorama des tendances du marché du film.

Guillaume Esmiol

Directeur Délégué
Marché du Film

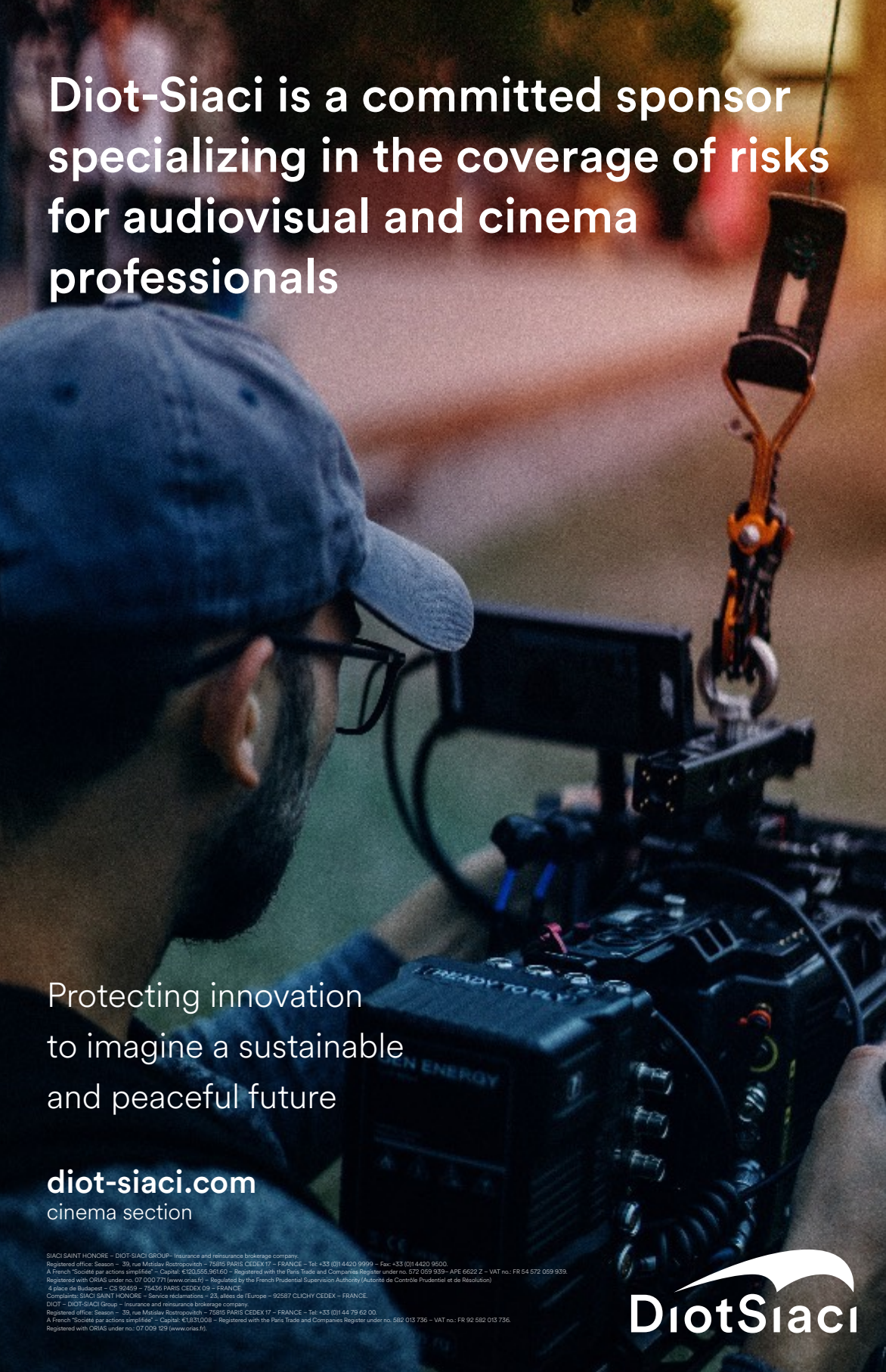
Cette année, l'édition 2024 de *FOCUS - Tendances mondiales du marché du film* sort le 17 mai, Journée internationale contre l'homophobie. Ce qui n'est qu'une pure coïncidence nous rappelle néanmoins que les films du monde entier ont à cœur de montrer la vie sous toutes ses facettes, grand public ou non, et représentent bien plus qu'un simple élément du marché.

Cependant, l'économie reste le moteur du marché du film et des données solides sur ce dernier y participent. Comme chaque année, l'Observatoire met ces données à disposition sous la forme du *FOCUS* qui repose sur deux socles : le soutien du réseau EFARN et le partenariat avec le Marché du Film de Cannes.

Soyez assuré(e)s que les rédacteurs de cette publication sont à la fois passionnés par la diversité des contenus cinématographiques et experts dans l'analyse de la manière dont ces contenus reflètent les tendances du marché.

Susanne Nikoltchev

Directrice exécutive
Observatoire européen de l'audiovisuel



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*partenaire des talents.

Once again, this new edition of the FOCUS offers a global view of film production, distribution and exhibition, with a market-by-market selection of the main developments that marked 2023. The FOCUS is complemented by numerous Observatory film-related publications on directors and writers, gender inequality, financing, exhibition, TV and VOD exploitation. Taken together, they provide a fairly complete picture of the state of the sector in Europe.

The new normal?

It would seem that many of the turbulences in the global film industries which were stirred or at least accelerated by the pandemic have subsided and most film industries have started to settle for return to a “new normal” in 2023.

After three years of a limited supply of blockbusters, a *normal* number of US tentpoles and national blockbusters were back in cinemas while there were indeed still fewer US mid-tier films. But this has been a trend several years in the making as US studios seem to have been increasingly focusing on tentpole releases in the theatrical exploitation.

According to provisional data compiled by the European Audiovisual Observatory, cinema attendance in wider Europe continued to grow by 18.3% in 2023, increasing by 134 million to an estimated 861 million tickets sold. While this remains about 23% below the pre-pandemic average of 1.11 billion, it can be considered as quite an achievement, given that during the COVID years and the rise of streaming, some predicted that theatrical exhibition had little future. However, as impacts from the 2023 US

strike actions - such as production and release delays - are likely to affect 2024 global box office markets, along with several big sports events such as the Olympic Games in Paris and the European Football Championship in Germany, it is questionable whether the European theatrical sector will be able to continue its growth trend in 2024. This raises the question as to whether the current admissions levels are already close to the low end of a new normal, keeping in mind that annual fluctuations between 10 and 70 million, linked to individual blockbuster breakout success, have regularly occurred in the European box office markets over the past two decades.

Another thing that seems to have subsided are the intense discussions about windows and the experimenting with business models questioning the importance of theatrical exploitation for a couple of years. The industry seems to have found new standard arrangements that seem to suit most of the players along the value chain and which confirm the theatrical window as a major revenue source for many films, as well as an important label to drive revenues/viewership in other windows.

The “theatrical label” in a world of abundant content

The Observatory’s research ⁽¹⁾ shows that in 2022, on average in a European Union country, almost 40 000 different films were available in cinemas, on television and, most of all, on VOD, including more than 13 200 European films. All of these films were not released theatrically in the EU, but the figure shows the extent to which VOD has changed the paradigm of film availability: on the one hand, VOD has opened up enormous new possibilities for facilitating access to films; on the other hand, the sheer number of works available carries the risk of *banalising* film.

At the same time, another Observatory study ⁽²⁾ suggests that, unlike TV series, original non-theatrical films have a limited audience share on the largest subscription VOD platforms, and that the “theatrically released” label is therefore key for consumers as it significantly improves the visibility of individual films and still drives value along the exploitation chain. How to maintain the relevance of this label is therefore a key question for producers, distributors and exhibitors.

Other figures from the Observatory ⁽³⁾ point to an apparent paradox: on the one hand, the concentration of admissions has increased in recent years; on the other hand, the diversity of European films on offer plays a key role in the composition of the European box office. In other words, the cumulative admissions of low and medium-grossing films are essential to the overall performance of European films in cinemas.

The case for diversity

This sheds new light on how the search for diversity of films leads to both a variety of films on offer and an overall benefit for the industry. On the one hand, a large and diverse film offering caters to diverse audiences which may be niche and do not drive overall box office growth as they often fall into the low-grossing category of films. But cumulatively low-grossing films accounted for almost 20% of total admissions in Europe in 2022 and therefore constitute an economically important segment of the film mix for cinemas. A diverse film offering based on original content also caters to a seemingly increasing audience taste for original films as the enthusiasm for franchise content seems to be fading. Apart from the economic benefits, a diverse film offering also plays a key role in talent development and innovative filmmaking.

Obviously, from the point of view of most individual low and medium budget film, financing cannot be achieved without public support (direct support and production incentives), which in 2021 accounted for around 50% of film financing (except in France, where the share is much lower) ⁽⁴⁾.

In short, the producers of European films are able to finance their films thanks to public support; exhibitors benefit from the mass of European films in order to obtain a significant number of admissions at a time when the success of US blockbusters and mid-tier films seems less guaranteed than it did a few years ago; countries benefit from a greater variety of films on offer and, by increasing the share of production

(1) [Films on EU screens: A comparative analysis of the film offering in cinemas, on VOD and on TV](#)

(2) [SVOD Usage in the European Union](#)

(3) [An analysis of European box office structure 2010-2022](#)

(4) Fiction film financing in Europe: A sample analysis of films released in 2021

incentives in public support, obtain additional economic benefits from the shooting of national and international films.

However, the weakest link in the system seems to be those distributors which mainly focus on the distribution of art-house films and which, apart from Creative Europe, benefit to a lesser extent from national public support and bear the risk of individual films. However, together with the exhibitors, they are responsible for promoting the quality of the aforementioned “theatrical label”.

Challenges and ongoing need for innovation

This is not to say that the European film sector does not have some problems to solve. Apart from the short/ mid- term consequences of the US strike actions in 2023, which are likely to affect film industries around the world, the European film sector is facing a number of – partly structural – challenges. These include the prevalence of public support might create a kind of disconnection with the commercial results of a film; the race for production incentives and the entry of streamers into the production market (which may already have peaked) is weakening low-budget films’ access to skills and production facilities; the increasing importance of promotion to create attention in a world of abundance of content; gender equality in key crew positions is progressing very slowly ⁽⁵⁾; the adaptation to new sustainable practices/standards is reshaping the ways films are

produced and exploited and of course the potential of AI powered solutions to significantly transform production and workflows and possibly access to content.

There seems to be a consensus that, in the context of such abundance of films, innovation in cinema production, distribution and exhibition, it is key to keep making going to the cinema an “event” that can compete, not necessarily with other forms of home entertainment (SVOD, gaming), but also with all forms of out-of-home leisure (restaurants, concerts, theatres, etc.). The industry is working to provide a better experience (from ticketing innovations to new audience services), to better target specific audiences, to offer more non-film content in cinemas, to make the best use of consumer data, etc.

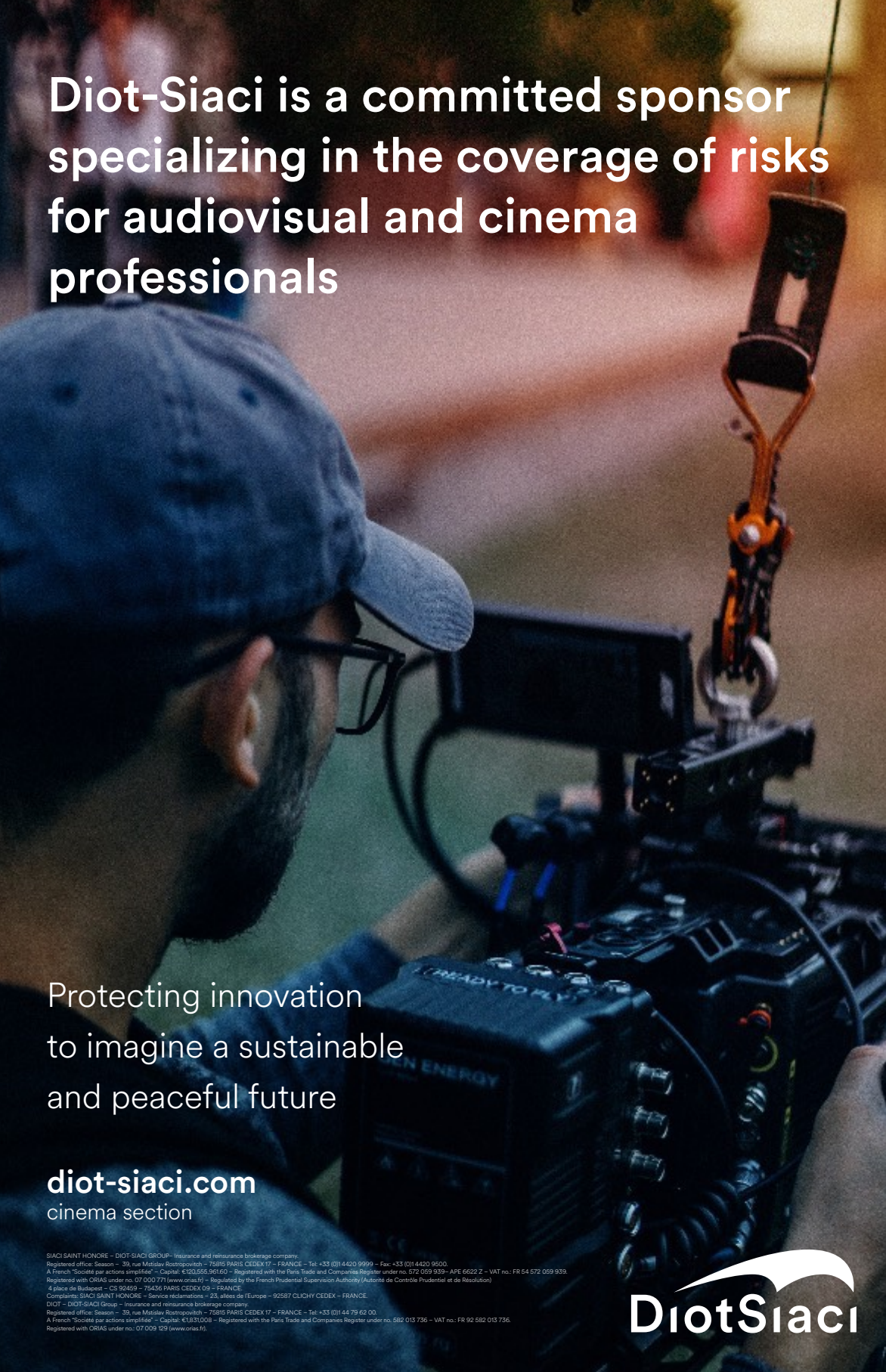
Ultimately, the central role of cinemas in the exploitation of films seems no longer up for debate. But the days of a one-size-fits-all approach for all films and all audiences may be over.

Gilles Fontaine
Head of the Market Information
Department

Martin Kanzler
Film Analyst

Manuel Fioroni
Film Analyst

(5) [Female professionals in European film production - 2023 edition](#)



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Top 10 markets worldwide by gross box office | 2019-2023^e

In USD billion. Converted at average annual exchange rates. Ranked by 2023 values. ⁽¹⁾

Sources: OBS, Comscore, Omdia, Gower Street Analytics, National data sources

Rank	Market	2019	2020	2021	2022	2023	Year-over-year change 2023/2022	Comparison 2023/avg 2017-2019
1	US & Canada	11.38	2.22	4.54	7.53	8.63	14.6%	75.3%
2	China	9.30	2.96	7.33	4.46	7.75	73.7%	86.8%
3	Japan	2.40	1.34	1.48	1.62	1.58	-3.4%	73.3%
4	India	1.55	0.28	0.51	1.35	1.48	9.4%	97.8%
5	France	1.62	0.49	0.80	1.15	1.44	25.0%	90.8%
6	United Kingdom	1.60	0.39	0.75	1.12	1.22	9.1%	73.8%
7	Germany	1.15	0.36	0.44	0.76	1.00	32.1%	88.6%
8	South Korea	1.64	0.43	0.51	0.90	0.97	7.6%	59.8%
9	Mexico	0.97	0.15	0.36	0.57	0.83	45.7%	93.5%
10	Australia	0.85	0.28	0.45	0.65	0.65	0.3%	72.6%
World total^e		42.3	11.78	21.3	25.9	33.9	30.9%	81.4%
Growth rate - World^e		1.2%	-72.2%	80.6%	21.8%	30.9%	30.9%	81.4%
Growth rate - Top 10^e		0.1%	-72.6%	92.7%	17.2%	27.0%	27.0%	80.3%
Growth rate - Top 10^e without China		-0.1%	-74.3%	65.4%	59.2%	13.7%	13.7%	77.7%

(1) Comparisons are based on USD values and might differ from figures measured in local currencies.

Top 10 markets worldwide by admissions | 2019-2023^e

In million. Ranked by 2023 admissions.

Sources: OBS, Omdia, Comscore, National data sources

Rank	Market	2019	2020	2021	2022	2023	Year-over-year change 2023/2022	Comparison 2023/avg 2017-2019
1	China	1 727	548	1 167	712	1 299	82.4%	76.9%
2	India	1 460	387	418	994	900	-9.5%	79.1%
3	US & Canada	1 242	242	447	715	831	16.2%	66.0%
4	Mexico	341	55	110	173	218	26.2%	65.6%
5	France	213	65	96	152	180	18.6%	86.7%
6	Japan	195	106	114	152	156	2.3%	86.6%
7	Russian Federation	220	89	146	83	126	51.6%	56.6%
8	South Korea	227	60	61	113	125	10.9%	70.8%
9	United Kingdom	176	44	74	117	124	5.4%	65.5%
10	Brazil	178	39	52	95	114	19.7%	85.3%
World total^e		7 519	2 042	3 216	4 262	5 204	22.1%	71.3%
Growth rate - World^e		0.1%	-72.8%	57.5%	32.5%	22.1%	22.1%	71.3%
Growth rate - Top 10^e		10.5%	-72.6%	64.1%	23.2%	23.2%	23.2%	72.9%
Growth rate - Top 10^e without China		15.2%	-74.4%	39.5%	71.0%	6.9%	6.9%	71.2%

Top 10 markets worldwide by number of screens | 2019-2023^e

In units. Ranked by 2023 values.

Sources: OBS, Omdia, National data sources

Rank	Market	2019	2020	2021	2022	2023	Year-over-year change 2023/2022	Comparison 2023/avg 2017-2019
1	China	69 787	75 581	82 248	83 998	86 310	2.8%	139.5%
2	US & Canada	43 679	44 111	43 646	42 063	41 077	-2.3%	96.8%
3	India	9 527	9 473	9 423	9 382	9 742	3.8%	98.2%
4	Mexico	7 493	7 494	7 361	7 410	7 389	-0.3%	105.1%
5	France	6 114	6 127	6 191	6 298	6 616	5.0%	104.9%
6	Russian Federation	5 583	5 456	5 705	5 681	5 868	3.3%	108.4%
7	Germany	4 961	4 926	4 931	4 911	4 901	-0.2%	100.8%
8	United Kingdom	4 782	4 682	4 610	4 720	4 749	0.6%	101.6%
9	Japan	3 583	3 616	3 648	3 634	3 653	0.5%	102.2%
10	Spain	3 695	3 701	3 631	3 638	3 605	-0.9%	100.1%
World total		200 954	207 650	215 337	212 590	214 130	0.7%	114.0%
Growth rate - World^e		7.5%	3.3%	3.7%	-1.3%	0.7%	0.7%	114.0%
Growth rate - Top 10^e		7.5%	3.7%	3.8%	0.2%	1.3%	1.3%	117.3%
Growth rate - Top 10^e without China and India		1.8%	0.3%	-0.5%	-1.7%	-0.6%	-0.6%	99.2%

Top 10 markets worldwide by feature film production | 2019-2023^{e (1)}

In units. Ranked by 2023 values.

Sources: OBS, National data sources

Rank	Market	2019	2020	2021	2022	prov. 2023	Year-over-year change 2023/2022	Comparison 2023/avg 2017-2019
1	China ⁽²⁾	850	531	565	380	792	108.4%	93.2%
2	India ⁽³⁾	661	163	533	978	746	-23.7%	112.9%
3	Japan ⁽⁴⁾	689	506	490	634	676	6.6%	107.0%
4	South Korea ⁽⁴⁾	502	615	653	703	608	-13.5%	125.8%
5	United States ⁽⁵⁾	814	443	941	803	510	-36.5%	62.9%
6	Italy ⁽⁶⁾	325	252	313	355	402	13.2%	144.8%
7	United Kingdom ⁽⁷⁾	399	294	337	364	365	0.3%	95.8%
8	Spain ⁽⁸⁾	263	215	263	312	324	3.8%	126.2%
9	France ⁽⁶⁾	301	237	340	287	298	3.8%	99.2%
10	Argentina ⁽⁴⁾	265	28	184	204	241	18.1%	99.4%
World total^{e (9)}		7 510	4 863	6 479	7 379	7 454	1.0%	99.3%
Growth rate - World^e		3.5%	-35.2%	33.2%	13.9%	1.0%	1.0%	99.3%
Growth rate - Top 10^e		3.9%	-35.2%	40.7%	8.7%	-1.2%	-1.2%	101.4%
Growth rate - Top 10^e without China		6.1%	-34.7%	47.3%	14.5%	-10.1%	-10.1%	103.1%

(1) Production data not available for all territories. Country data include minority co-productions.

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

(3) Restated time series. Number of feature films released with GBO above INR 100 000 (USD 1 200).

(4) Number of feature films released.

(5) Number of feature films entering production. Includes films that were made for or by an online video service; does not include student films, documentaries, films created for straight-to-DVD or Blu-ray release.

(6) Number of feature films produced

(7) Number of feature films produced. Figures for 2022 and 2023 are provisional Observatory estimates based on interim BFI figures.

(8) Number of certified feature films produced. Excludes experimental features.

(9) Restated time series

Top 50 films released in 2023 by gross box office worldwide | 2023⁽¹⁾

In estimated USD million.

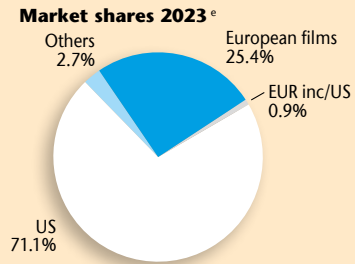
Original title	Country of origin	Studio	Global box office	North American share
1 Barbie	US/GB	Warner Bros.	1 439.8	44%
2 The Super Mario Bros. Movie	US/JP	Universal	1 363.3	42%
3 Oppenheimer	US/GB	Universal	955.2	34%
4 Guardians of the Galaxy Vol. 3	US	Disney	845.5	42%
5 Fast X	US	Universal	714.6	20%
6 Spider-Man: Across the Spider-Verse	US	Sony	682.6	56%
7 Full River Red	CN	Huanxi Media	673.6	
8 The Wandering Earth 2	CN	China Film Group	604.5	1%
9 The Little Mermaid	US	Disney	568.3	52%
10 Mission: Impossible - Dead Reckoning Part One	US	Paramount	566.3	30%
11 No More Bet	CN	Dirty Monkeys	540.5	
12 Elemental	US	Disney	486.7	32%
13 Lost in the Stars	CN	As One Production	486.2	0%
14 Ant-Man and the Wasp: Quantumania	US	Disney	463.6	46%
15 Transformers: Rise of the Beasts	US	Paramount	437.7	36%
16 John Wick: Chapter 4	US/DE	Lionsgate	432.7	43%
17 Meg 2: The Trench	US/CN	Warner Bros.	394.3	21%
18 Indiana Jones and the Dial of Destiny	US	Disney	381.6	46%
19 Wonka	US/GB	Warner Bros.	379.0	36%
20 Creation of the Gods I: Kingdom of Storms	CN	Beijing Culture	372.9	
21 The Hunger Games: The Ballad of Songbirds & Snakes	US/CA	Lionsgate	313.0	51%
22 Never Say Never	CN	Happy Pictures	304.3	
23 Five Nights at Freddy's	US	Universal	295.1	47%
24 Creed III	US	MGM	274.4	57%
25 The Nun II	US	Warner Bros.	268.1	32%
26 The Flash	US	Warner Bros.	266.5	41%
27 Aquaman and the Lost Kingdom	US/AU/IS	Warner Bros.	251.4	31%
28 Taylor Swift: The Eras Tour	US	AMC	250.3	72%
29 Sound of Freedom	US/MX	Angel Studios	250.3	74%
30 Chang An	CN	Light Chaser	250.2	
31 Boonie Bears: Guardian Code	CN	Fantawild	222.0	
32 Dungeons & Dragons: Honor Among Thieves	US/CA/GB/IS/AU	Paramount	207.6	45%
33 Napoleon	US/GB	Apple	206.7	29%
34 PAW Patrol: The Mighty Movie	US/CA	Paramount	200.7	33%
35 The Marvels	US	Disney	200.0	42%
36 Trolls Band Together	US	Universal	198.7	49%
37 Under the Light	CN	Enlight Media	189.1	
38 Insidious: The Red Door	US/CA	Sony	186.3	44%
39 The Equalizer 3	US/IT	Sony	185.7	50%
40 Teenage Mutant Ninja Turtles: Mutant Mayhem	US	Paramount	180.4	66%
41 Wish	US	Disney	176.4	34%
42 Godspeed	CN	Shanghai Tingdong Film	175.7	
43 Scream VI	US/CA	Paramount	168.8	64%
44 Killers of the Flower Moon	US	Apple	156.2	43%
45 Evil Dead Rise	US/NZ/IE	Warner Bros.	146.0	46%
46 The Ex-Files 4: Marriage Plan	CN	Huayi Brothers	141.1	
47 Hidden Blade	CN	Bona Film Group	139.1	1%
48 The Exorcist: Believer	US	Universal	136.9	48%
49 Jawan	IN	Red Chillies Ent.	136.7	11%
50 Deep Sea	CN	Enlight Media	136.1	

(1) Refers to cumulative GBO as of January 1, 2024.

Sources: The Numbers, LUMIERE/OBS

Europe 28⁽¹⁾

Population 2023 [°]	516.8 million
GDP per capita 2023 [°]	55 907 USD
Gross box office 2023 [°]	6.20 bn EUR (6.71 bn USD)
Admissions 2023 [°]	784.3 million
Average ticket price 2023 [°]	7.9 EUR (8.6 USD)
Average admissions per capita 2023 [°]	1.5
Screens 2022 2023	32 864 33 215



Cinema attendance in Europe keeps on growing

Within the EU and the UK, admissions increased in 2023 by almost 130 million to an estimated 784 million, representing a remarkable 19.6% year-on-year growth but remained about 20% below the pre-pandemic average observed between 2017 and 2019. Driven by an increase in ticket prices in several European markets, GBO grew by 22% from EUR 5.08 billion to an estimated EUR 6.20 billion, only 11% down on the average pre-pandemic box office level. As impacts from the US 2023 strike actions - such as production and release delays - are likely to affect 2024 global box office markets, along with several big sports events such as the Olympic Games in Paris and the European Football Championship in Germany, it is questionable to which extent the European theatrical sector will be able to continue its growth trend in 2024.

Admissions increased in all EU member states and the UK with the exception of Denmark and Czechia where cinema attendance actually declined in 2023 after reaching recovery rates of about 80% already in 2022. But there were also significant differences in growth among the other European markets ranging from a 59% year-on-year increase in Italy, which had registered the lowest recovery rate in 2022, to a mere 2% in Slovenia. In terms of recovery rates Romania, Luxembourg, Belgium and France were the leading European markets with admissions reaching 94% to 87% of their pre-pandemic averages, respectively. At the other end of the spectrum, cinema attendance in the UK and Sweden represented only 68% and 71% of their pre-pandemic averages.

Box office growth in 2023 was primarily driven by the strong performance of US blockbusters with US films selling an estimated 560 million tickets in the EU and the UK in 2023, 140 million more

than in 2022, reaching about 86% of their average pre-pandemic admissions. European films, on the other hand could not expand on their comparatively strong results in 2022, selling an estimated 200 million tickets, only 10 million more than in 2022 reaching about 77% of their pre-pandemic average. The estimated market share of European films therefore dropped from 28.7% in 2022 to 25.4% in 2023, a result which ranks among the lowest shares of the past decade. US market share on the other hand grew from 64.0% to an estimated 71.1%, the highest share in recent history as there were hardly any European incoming investment blockbusters in 2023.

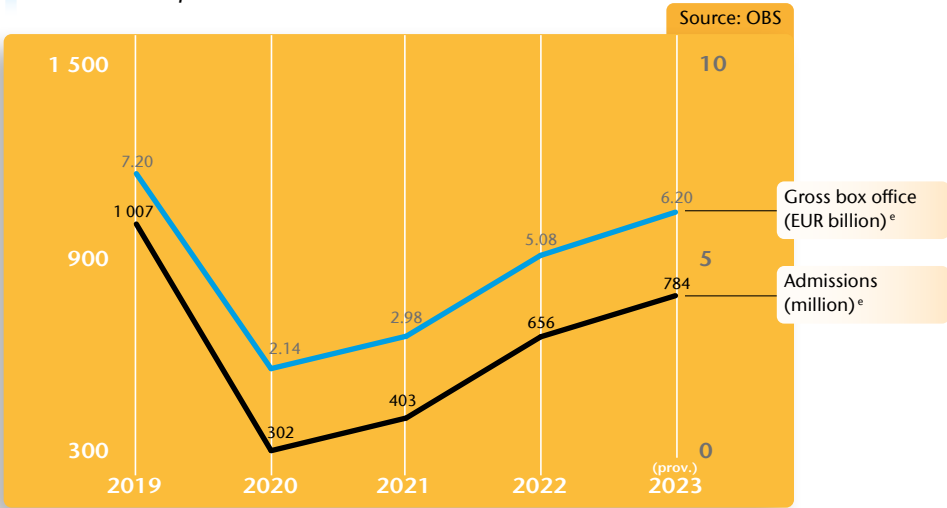
Production levels in the EU and the UK reach second highest level

In contrast to cinema attendance, European film production continues to grow even beyond its pre-pandemic average. An estimated total of 1 996 feature films were produced in the EU and the UK in 2023. This is 54 films more than in 2022 and represents the second highest production level registered after the record high of 2 053 feature film productions in 2019. This growth was primarily driven by the increased production of feature fiction films, which increased by 40 films to an estimated total of 1 223 films, as the number of feature documentaries increased by 14 films to a total of 773 films. Trends differ between countries, partly due to different methodologies in counting productions with some countries registering significantly higher production levels when compared to the pre-pandemic average (e.g. Italy and Spain), while in other countries film production still remains comparatively low such as in Belgium, Romania or Poland.

Source: European Audiovisual Observatory (OBS)

(1) Europe 28 refers to the 27 EU member states and the UK. Please note that all 2023 figures for the EU and the UK are provisional estimates. "EUR inc" refers to films produced in Europe with US studio incoming investment.

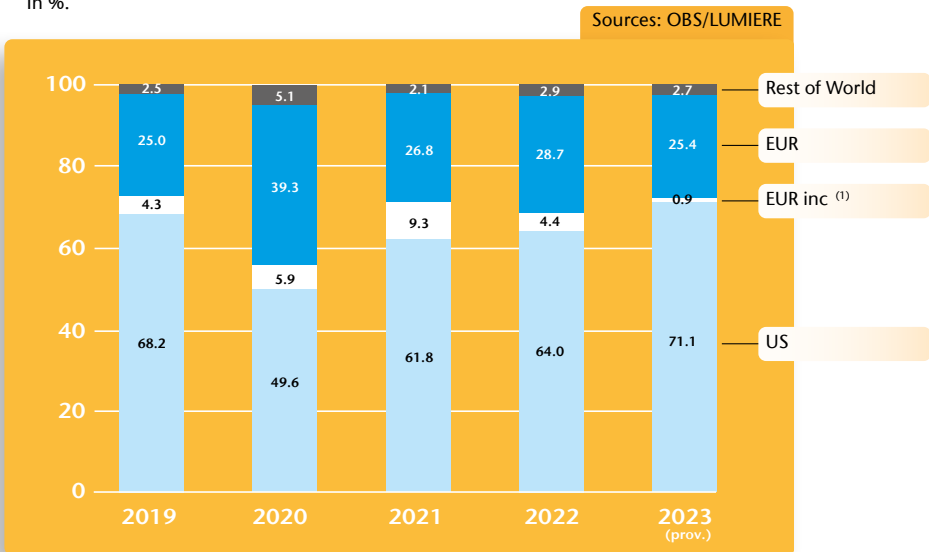
Admissions and GBO in the European Union & UK ⁽¹⁾ 2019-2023^e prov.



(1) National currencies converted to EUR at average annual exchange rates.

Breakdown of EU & UK admissions by nationality of films | 2019-2023^e

In %.



(1) 'inc' refers to films produced in Europe with US studio investments.

Number of feature films produced in the European Union & UK | 2019-2023 *prov.*

In units.

Country		2019	2020	2021	2022	prov. 2023	Sources
Austria	100% national fiction	14	4	9	11	14	Austrian Film Institute
	maj. co-prod. fiction	1	1	3	8	5	Austrian Film Institute
	min. co-prod. fiction	3	3	6	4	5	Austrian Film Institute
	Feature documentaries	26	16	14	18	20	Austrian Film Institute
Belgium ⁽¹⁾	100% national fiction	9	1	12	3	4	CFWB/VAF
	maj. co-prod. fiction	20	12	16	16	13	CFWB/VAF
	min. co-prod. fiction	28	25	33	23	38	CFWB/VAF
	Feature documentaries	14	6	8	17	15	CFWB/VAF
Bulgaria ⁽²⁾	100% national fiction	9	12	9	8	6	National Film Center
	maj. co-prod. fiction	2	2	2	2	2	National Film Center
	min. co-prod. fiction	1	4	4	6	7	National Film Center
	Feature documentaries	12	7	6	8	16	National Film Center
Cyprus ^e	100% national fiction	2	0	1	1	4	Dept. of Cult. Services/Min. Cult.
	maj. co-prod. Fiction	0	0	3	3	1	Dept. of Cult. Services/Min. Cult.
	min. co-prod. Fiction	0	1	1	4	1	Dept. of Cult. Services/Min. Cult.
	Feature documentaries	1	0	1	1	1	Dept. of Cult. Services/Min. Cult.
Croatia ⁽²⁾	100% national fiction	6	2	3	8	7	Croatian Audiovisual Centre
	maj. co-prod. fiction	6	1	4	8	5	Croatian Audiovisual Centre
	min. co-prod. fiction	15	3	5	11	12	Croatian Audiovisual Centre
	Feature documentaries	13	11	11	12	12	Croatian Audiovisual Centre
Czechia ⁽²⁾	100% national fiction	21	16	21	24	19	Czech Film Fund
	maj. co-prod. fiction	16	7	14	15	17	Czech Film Fund
	min. co-prod. fiction	12	7	14	18	11	Czech Film Fund
	Feature documentaries	39	30	35	39	27	Czech Film Fund
Denmark ⁽³⁾	100% national fiction	10	14	17	11	8	Danish Film Institute
	maj. co-prod. fiction	9	6	4	8	9	Danish Film Institute
	min. co-prod. fiction	9	8	9	8	8	Danish Film Institute
	Feature documentaries	28	30	24	27	28	Danish Film Institute
Estonia ⁽²⁾	100% national fiction	9	5	6	5	10	Estonian Film Institute
	maj. co-prod. fiction	3	4	1	5	2	Estonian Film Institute
	min. co-prod. fiction	2	5	2	2	0	Estonian Film Institute
	Feature documentaries	12	9	14	12	16	Estonian Film Institute
Finland ⁽³⁾	100% national fiction	17	17	12	13	11	Finnish Film Foundation
	maj. co-prod. fiction	2	4	4	3	6	Finnish Film Foundation
	min. co-prod. fiction	4	4	6	7	6	Finnish Film Foundation
	Feature documentaries	23	21	18	17	22	Finnish Film Foundation
France	100% national fiction	138	115	169	114	155	CNC
	maj. co-prod. fiction	46	25	52	51	48	CNC
	min. co-prod. fiction	52	45	69	68	55	CNC
	Feature documentaries	65	52	50	54	40	CNC
Germany ⁽²⁾	100% national fiction	96	44	57	65	60	SPIO
	maj. co-prod. fiction	38	24	22	32	37	SPIO
	min. co-prod. fiction	23	23	28	30	27	SPIO
	Feature documentaries	108	61	78	71	94	SPIO
Greece ^{(2)e}	100% national fiction	12	6	12	10	12	Greek Film Centre
	maj. co-prod. fiction	5	2	8	5	3	Greek Film Centre
	min. co-prod. fiction	4	0	1	6	2	Greek Film Centre
	Feature documentaries	9	2	7	3	22	Greek Film Centre
Hungary	100% national fiction	11	13	16	13	14	National Film Office (NMHH)
	maj. co-prod. fiction	4	3	2	1	3	National Film Office (NMHH)
	min. co-prod. fiction	3	2	8	6	2	National Film Office (NMHH)
	Feature documentaries	1	3	0	3	5	National Film Office (NMHH)
Ireland	100% national fiction	6	5	4	3	4	Screen Ireland
	maj. co-prod. fiction	4	3	7	7	7	Screen Ireland
	min. co-prod. fiction	6	3	3	3	7	Screen Ireland
	Feature documentaries	10	7	12	4	8	Screen Ireland
Italy	100% national fiction	160	124	127	167	177	MiC - DG Cinema et Audiovisivo
	maj. co-prod. fiction	32	27	45	29	31	MiC - DG Cinema et Audiovisivo
	min. co-prod. fiction	11	12	14	13	33	MiC - DG Cinema et Audiovisivo
	Feature documentaries	122	89	127	146	161	MiC - DG Cinema et Audiovisivo

Continued

Number of feature films produced in the European Union & UK | 2019-2023 *prov.*

In units.

Country		2019	2020	2021	2022	prov. 2023	Sources
Latvia ⁽²⁾	100% national fiction	10	5	4	10	10	National Film Centre of Latvia
	maj. co-prod. fiction	2	2	3	8	1	National Film Centre of Latvia
	min. co-prod. fiction	5	2	0	4	4	National Film Centre of Latvia
	Feature documentaries	20	7	5	20	11	National Film Centre of Latvia
Lithuania ⁽²⁾	100% national fiction	10	8	6	12	15	Lithuanian Film Centre
	maj. co-prod. fiction	4	0	0	2	1	Lithuanian Film Centre
	min. co-prod. fiction	2	2	3	4	0	Lithuanian Film Centre
	Feature documentaries	9	2	3	8	0	Lithuanian Film Centre
Luxembourg ^{(2) e}	100% national fiction	1	0	0	0	1	OBS/LFF
	maj. co-prod. fiction	2	1	2	3	5	OBS/LFF
	min. co-prod. fiction	14	10	9	15	22	OBS/LFF
	Feature documentaries	3	4	3	3	2	OBS/LFF
Malta ^e	Total	4	3	6	7	5	IMDB/OBS
	100% nat. and majority	3	2	4	6	3	IMDB/OBS
The Netherlands	100% national fiction	26	25	30	29	31	NFF
	maj. co-prod. fiction	16	6	9	18	18	NFF
	min. co-prod. fiction	15	16	24	20	19	NFF
	Feature documentaries	40	19	18	32	33	NFF
Poland	100% national fiction	27	15	26	38	18	Polish Film Institute
	maj. co-prod. fiction	13	3	12	6	8	Polish Film Institute
	min. co-prod. fiction	14	1	14	15	9	Polish Film Institute
	Feature documentaries	39	5	38	25	20	Polish Film Institute
Portugal	100% national fiction	12	7	8	14	11	ICA
	maj. co-prod. fiction	4	2	3	7	12	ICA
	min. co-prod. fiction	6	3	4	9	8	ICA
	Feature documentaries	15	13	17	26	21	ICA
Romania	100% national fiction	38	23	32	23	21	Centrul Nat. al Cinema. (CNC)
	maj. co-prod. fiction	3	5	6	9	5	Centrul Nat. al Cinema. (CNC)
	min. co-prod. fiction	2	5	6	4	4	Centrul Nat. al Cinema. (CNC)
	Feature documentaries	11	8	11	12	6	Centrul Nat. al Cinema. (CNC)
Slovakia ⁽²⁾	100% national fiction	8	0	1	5	5	Slovak Film Institute
	maj. co-prod. fiction	7	4	3	13	7	Slovak Film Institute
	min. co-prod. fiction	13	7	12	12	18	Slovak Film Institute
	Feature documentaries	16	17	10	20	15	Slovak Film Institute
Slovenia ⁽²⁾	100% national fiction	6	0	5	2	1	Slovenian Film Center
	maj. co-prod. fiction	5	1	2	5	6	Slovenian Film Center
	min. co-prod. fiction	8	5	7	6	5	Slovenian Film Center
	Feature documentaries	12	7	10	23	5	Slovenian Film Center
Spain ⁽⁷⁾	100% national fiction	85	76	92	97	121	ICAA
	maj. co-prod. fiction	22	17	28	40	32	ICAA
	min. co-prod. fiction	21	9	7	18	13	ICAA
	Feature documentaries	135	113	136	157	158	ICAA
Sweden ⁽²⁾	100% national fiction	20	15	12	22	27	SFI
	maj. co-prod. fiction	9	6	5	8	5	SFI
	min. co-prod. fiction	14	5	10	9	11	SFI
	Feature documentaries	25	22	22	27	30	SFI
United Kingdom ⁽⁴⁾	100% national fiction	171	157	172	148	147	BFI, OBS
	maj. co-prod. fiction	11	14	9	9	18	BFI, OBS
	min. co-prod. fiction	17	10	16	20	25	BFI, OBS
	Feature documentaries	92	60	70	66	71	BFI, OBS
	Inward features ⁽⁵⁾	108	53	70	121	104	BFI, OBS
Total fiction films EU 27 & GB ^{(6) e}		1 223	893	1 136	1 183	1 223	OBS
Total feature docs. EU 27 & GB ^{(6) e}		830	561	669	759	773	OBS
Total feature films EU 27 & GB ^{(6) e}		2 053	1 454	1 805	1 942	1 996	OBS

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

(2) Films on first release.

(3) Films receiving national support.

(4) Figures for 2022 and 2023 are provisional Observatory estimates based on interim BFI figures to adjust for a time lag in identifying film productions with budgets below GBP 500 000.

(5) Including inward feature co-productions, excluding inward features involving only VFX work in the UK.

(6) Restated data series. Excluding GB inward investment features.

(7) Films certified. Excluding 15 theatrical experimental feature films in 2023, 9 in 2022, 12 in 2021, six in 2020 and 2 in 2019.

Admissions in the European Union & UK | 2019-2023^e prov.

In millions. Provisional data.

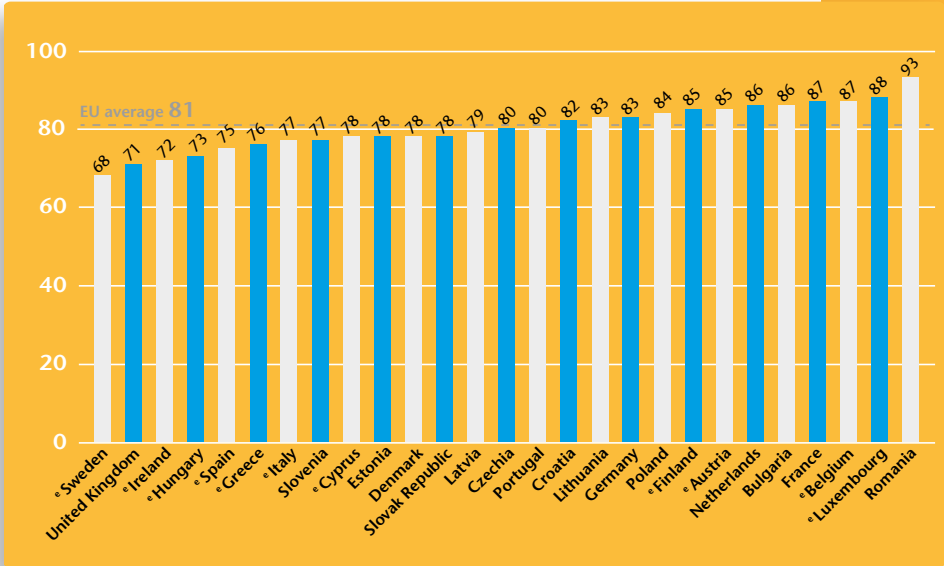
ISO	Country	2019	2020	2021	2022	prov. 2023	2023/22	Sources
AT	Austria^e	13.7	3.9	5.2	10.0	11.7	16.8%	Austrian Film Institute
BE	Belgium^e	19.9	5.6	7.5	14.1	16.9	19.4%	VAF/CFWB/Cinedata/SPF Economie/FCB
BG	Bulgaria	5.0	1.3	2.6	4.0	4.5	12.8%	National Film Center
CY	Cyprus^e	0.8	0.2	0.3	0.5	0.6	30.5%	Min. Cult.
CZ	Czechia	18.3	6.4	7.1	13.5	13.3	-1.2%	Czech Film Fund
DE	Germany	118.6	38.1	42.1	78.0	95.7	22.7%	FFA
DK	Denmark	12.8	7.0	6.6	9.9	9.7	-1.9%	Statistics Denmark/ Danish Film Institute
EE	Estonia	3.7	1.8	1.4	2.3	2.8	21.0%	Estonian Film Institute
ES	Spain^e	104.9	27.0	41.7	61.1	76.4	25.0%	ICAA
FI	Finland^e	8.4	3.9	3.4	5.8	7.2	23.1%	Finnish Film Foundation
FR	France	213.2	65.3	95.5	152.1	180.4	18.6%	CNC
GB	United Kingdom	176.1	44.0	74.0	117.3	123.6	5.4%	BFI/DCM
GR	Greece^e	9.6	3.1	3.1	5.5	7.4	34.8%	Greek Film Center
HR	Croatia	4.9	1.4	2.5	3.2	3.8	18.0%	Croatian Audiovisual Centre
HU	Hungary^e	15.2	4.3	6.2	10.2	11.1	8.5%	National Film Office
IE	Ireland^e	15.1	3.7	5.8	10.5	11.5	9.4%	Screen Ireland
IT	Italy^e	104.4	30.3	26.7	47.7	75.9	59.2%	SIAE/Cinetel/ANICA
LT	Lithuania	4.2	1.5	1.3	3.0	3.4	14.9%	Lithuanian Film Centre
LU	Luxembourg^e	1.1	0.3	0.5	0.8	1.0	30.1%	CNA
LV	Latvia	2.7	0.9	0.5	1.7	2.0	18.4%	National Film Centre of Latvia
MT	Malta	0.7	0.2	0.3	0.5	~	~	National Statistics Office Malta
NL	Netherlands	38.0	16.8	14.3	25.0	31.6	26.5%	NFF/MaccsBox - NVB & NVF
PL	Poland	60.6	19.7	35.2	41.8	49.8	19.3%	Polish Film Institute
PT	Portugal	15.5	3.8	5.5	9.6	12.3	28.0%	Instituto do Cinema e do Audiovisual
RO	Romania	14.3	3.1	4.7	11.2	13.0	15.9%	Centrul National al Cinematografiei
SE	Sweden^e	15.9	5.7	6.0	10.4	11.2	7.7%	Swedish Film Institute
SI	Slovenia	2.4	0.6	0.7	1.8	1.9	2.4%	Slovenian Film Centre
SK	Slovak Republic	6.5	2.4	2.0	4.3	5.0	15.7%	Slovak Film Institute/UFD
EU 27 & GB - Total^e		1 007	302	403	656	784	19.6%	European Audiovisual Observatory

Source: OBS

Relative recovery rates of admissions in the EU & UK by country 2023 in relation to average 2017 to 2019^e

In %.

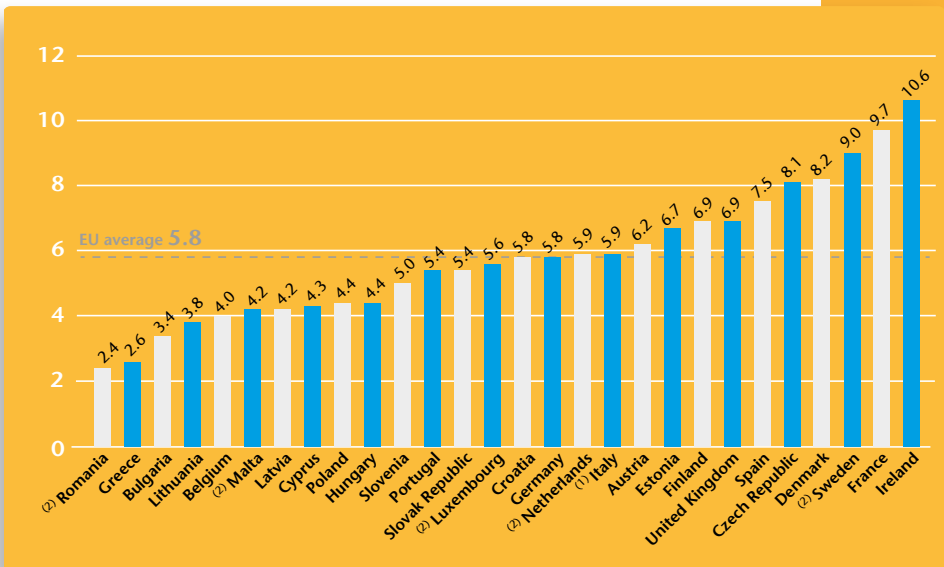
Source: OBS



Number of screens per 100 000 inhabitants in the EU & UK by country | December 2023^e

In units.

Source: OBS



(1) Commercial screens covered by Cinetel, excluding open air cinemas.
 (2) Estimated as of December 2022

The tables below offer provisional rankings based on the analysis of partially fragmentary data for 25 EU member states and the UK representing 91% of all admissions in the EU and the UK.

Top 25 films by admissions in the European Union and UK | 2023 *prov.*

Original title	Country of origin	Director(s)	Release markets	Admissions <i>prov.</i>
1 Barbie	US/GB	Greta Gerwig	26	46 381 895
2 The Super Mario Bros. Movie	US/JP	A. Horvath, M. Jelenic, ... ⁽¹⁾	26	34 503 712
3 Oppenheimer	US/GB	Christopher Nolan	26	32 313 003
4 Avatar: The Way of Water ⁽³⁾	US	James Cameron	26	32 040 578
5 Guardians of the Galaxy Vol. 3	US	James Gunn	25	16 462 542
6 Elemental	US	Peter Sohn	25	15 183 476
7 Wonka	US/GB	Paul King	25	13 618 511
8 Puss in Boots: The Last Wish ⁽⁴⁾	US	J. Crawford, J. Mercado	26	13 246 611
9 Indiana Jones and the Dial of Destiny	US	James Mangold	25	12 523 152
10 The Little Mermaid	US	Rob Marshall	25	12 480 815
11 Fast X	US	Louis Leterrier Justin Lin	25	12 326 920
12 Spider-Man: Across the Spider-Verse	US	J. Dos Santos, K. Powers, ... ⁽²⁾	26	12 032 299
13 Mission: Impossible - Dead Reckoning...	US	Christopher McQuarrie	25	11 498 279
14 PAW Patrol: The Mighty Movie	US/CA	Cal Brunker	26	9 285 903
15 Napoleon	US/GB	Ridley Scott	25	8 823 946
16 John Wick: Chapter 4	US/DE	Chad Stahelski	25	8 649 352
17 Meg 2: The Trench	US/CN	Ben Wheatley	25	8 595 750
18 The Hunger Games: The Ballad of...	US/CA	Francis Lawrence	24	8 541 147
19 Creed III	US	Michael B. Jordan	25	8 275 014
20 Ant-Man and the Wasp: Quantumania	US	Peyton Reed	25	8 137 951
21 Wish	US	C. Buck, F. Veerasunthorn	24	7 655 529
22 Five Nights at Freddy's	US	Emma Tammi	26	6 938 464
23 Trolls Band Together	US	Tim Heitz Walt Dohrn	25	6 895 432
24 The Nun II	US	Michael Chaves	25	6 606 598
25 Astérix & Obélix: L'Empire du Milieu	FR	Guillaume Canet	23	6 139 526

(1) Pierre Leduc, Fabien Polack

(2) Justin K. Thompson

Source: OBS/LUMIERE

(3) 32 171 337 admissions in the EU and UK in 2022.

(4) 4 722 307 admissions in the EU and UK in 2022.

Top 25 European films (including EUR inc) by admissions in the European Union and UK | 2023 *prov.*

Original title	Country of origin	Director(s)	Release markets	Admissions <i>prov.</i>
1 Astérix & Obélix: L'Empire du Milieu	FR	Guillaume Canet	23	6 139 526
2 C'è ancora domani (There's Still...)	IT	Paola Cortellesi	1	4 840 575
3 Alibi.com 2	FR	Philippe Lacheau	13	4 449 544
4 Mummies	ES inc/US	Juan Jesús García Galocha	23	4 274 238
5 Les trois mousquetaires: D'Artagnan	FR	Martin Bourboulon	23	3 993 046
6 Miraculous: Le Film (Ladybug & Cat...)	FR	Jeremy Zag	14	3 660 449
7 Anatomie d'une chute (Anatomy of a...)	FR	Justine Triet	18	2 337 404
8 3 jours max (Only 3 Days Left)	FR	Tarek Boudali	4	1 981 047
9 Campeonex (Championext)	ES	Javier Fesser	1	1 945 125
10 Chłopi (The Peasants)	PL/RS/LT	D. Kobiela, H. Welchman	10	1 881 083
11 Rehragout-Rendezvous	DE	Ed Herzog	3	1 822 348
12 Die drei ??? - Erbe des Drachen	DE	Tim Dünschede	3	1 700 686
13 Pattie et la colère de Poséidon ⁽¹⁾ (Epic...)	FR	D. Alaux, Eric Tosti, J-F.Tosti	20	1 655 045
14 Mavka. Lisova pisnya (Mavka: The...)	UA	Malamuzh, Ruban, Yermak	22	1 592 126
15 Mon crime (The Crime Is Mine)	FR	François Ozon	16	1 500 900
16 Manta, Manta - Zwoter Teil	DE	Til Schweiger	4	1 365 052
17 The Amazing Maurice ⁽²⁾	GB/DE	T. Genkel, F. Westermann	23	1 357 375
18 Le otto montagne ⁽³⁾ (The Eight...)	IT/BE/FR	Groeningen, Vandermeersch	23	1 308 648
19 Jeanne du Barry	FR	Maiwenn	19	1 293 290
20 Ocho apellidos marroquís	ES	Álvaro Fernández Armero	1	1 289 884
21 Sur les chemins noirs (On the...)	FR	Denis Imbert	8	1 256 523
22 Tirailleurs ⁽⁴⁾ (Father and Soldier)	FR/SN	Mathieu Vadepied	12	1 255 634
23 Je verrai toujours vos visages (All Your...)	FR	Jeanne Herry	6	1 232 576
24 Les Trois Mousquetaires: Milady (The...)	FR	Martin Bourboulon	9	1 229 812
25 Vacaciones de verano	ES	Santiago Segura	1	1 219 724

(1) 27 725 admissions in the EU and UK in 2022.

(2) 69 745 admissions in the EU and UK in 2022.

Source: OBS/LUMIERE

(3) 450 481 admissions in the EU and UK in 2022.

(4) 12 415 admissions in the EU and UK in 2022.

Top 25 European films by admissions in the Europa Cinemas Network | 2023 ⁽¹⁾

Original title	Country of origin ⁽²⁾	Director(s)	Release markets	Admissions ^{prov.}
1 Anatomie d'une chute (Anatomy of a Fall)	FR	Justine Triet	26	1 091 139
2 C'è ancora domani (There's Still...)	IT	Paola Cortellesi	5	681 890
3 Le otto montagne (The Eight Mountains)	IT/BE/FR	Groeningen, Vandermeersch	30	660 930
4 Kuolleet lehdet (Fallen Leaves)	FI/DE	Aki Kaurismäki	28	544 571
5 Triangle of Sadness	SE/DE/FR/GB	Ruben Östlund	33	541 977
6 Mon crime (The Crime Is Mine)	FR	François Ozon	27	464 332
7 Il sol dell'avvenire (A Brighter Tomorrow)	IT/FR	Nanni Moretti	16	440 839
8 An Cailín Ciúin (The Quiet Girl)	IE	Colm Bairéad	22	408 603
9 Io capitano	IT/BE/FR	Matteo Garrone	8	322 591
10 Jeanne du Barry	FR	Maiwenn	26	308 734
11 Close	BE/FR/NL	Lukas Dhont	29	299 840
12 Le bleu du caftan (The Blue Caftan)	FR/MA/BE/DK	Maryam Touzani	27	294 525
13 Rapito (Kidnapped)	IT/FR/DE	Marco Bellocchio	14	283 708
14 Je verrai toujours vos visages	FR	Jeanne Herry	8	254 304
15 Das Lehrerzimmer (The Teachers'...)	DE	Ilker Çatak	16	247 239
16 Le Règne Animal (The Animal Kingdom)	FR	Thomas Cailley	14	236 450
17 Wann wird es endlich wieder so, wie es...	DE	Sonja Heiss	7	235 607
18 As bestas (The Beasts)	ES/FR	Rodrigo Sorogoyen	23	224 318
19 L'immensità	IT/FR	Emanuele Crialese	26	200 874
20 Chłopi (The Peasants)	PL/RS/LT	D. Kobiela, H. Welchman	13	198 978
21 Roter Himmel (Afire)	DE	Christian Petzold	24	196 837
22 L'Amour et les Forêts (Just The Two of Us)	FR	Valérie Donzelli	7	191 927
23 Anselm - Das Rauschen der Zeit (Anselm)	DE	Wim Wenders	15	191 652
24 Sur les chemins noirs (On the Wandering...)	FR	Denis Imbert	10	183 751
25 Une belle course (Driving Madeleine)	FR/BE	Christian Carion	14	183 597

(1) Data based on admissions from Europa Cinemas members in 33 MEDIA countries, 707 cities, 1 209 cinemas, 2 845 screens.

Sources: Europa Cinemas, OBS

(2) Country of origin as allocated in LUMIERE database.

Top 25 European films (including EUR inc) by admissions in the US & Canada | 2023 ^e

Admissions estimated based on the average ticket price of USD 10.53 as communicated by Comscore.

Original title	Country of origin	Director(s)	Distributor (US)	Admissions ^e
1 Poor Things	GB inc/US/IE	Yorgos Lanthimos	Fox Searchlight Pict.	760 226
2 Sisu	FI/GB	Jalmari Helander	Lionsgate	689 993
3 Mummies	ES inc/US	J. J. García Galocha	Warner Bros.	471 083
4 Golda	GB/US	Guy Nattiv	Bleecker Street	455 937
5 Marlowe	IE/ES/FR	Neil Jordan	Briarcliff Ent./Open Road	413 128
6 Mafia Mamma	GB/IT/US	Catherine Hardwicke	Bleecker Street	359 576
7 Anatomie d'une chute	FR	Justine Triet	Neon Rated	353 315
8 The Amazing Maurice	GB/DE	Genkel, Westermann	Viva Pict. Distribution	309 152
9 Living	GB/SE	Oliver Hermanus	Sony	281 126
10 The Miracle Club	IE/GB	Thaddeus O'Sullivan	Sony	227 047
11 Polite Society	GB	Nida Manzoor	Focus Features	151 527
12 An Cailín Ciúin	IE	Colm Bairéad	Super	141 169
13 All of Those Voices	GB	Charlie Lightening	Trafalgar	115 247
14 The Lost King	GB	Stephen Frears	IFC Films	112 945
15 Emily	GB/US	Frances O'Connor	Bleecker Street	104 185
16 Inside	GR/DE/BE	Vasilis Katsoupis	Focus Features	87 219
17 Close	BE/FR/NL	Lukas Dhont	A24 Films	82 502
18 It's a Wonderful Knife	GB/US/CA	Tyler MacIntyre	IFC Films	77 096
19 Retour à Séoul (Return to...)	FR/DE/BE/KR/... ⁽¹⁾	Davy Chou	Sony	73 734
20 The Devil Conspiracy	CZ	Nathan Frankowski	Independent	72 653
21 Monty Python and the Holy...	GB	T. Gilliam, T. Jones	Iconic Events	69 772
22 Harry Potter and the Deathly...	GB inc/US	David Yates	Warner Bros.	67 048
23 Inspector Sun y la maldición...	ES	Julio Soto Gurgipide	Viva Pict. Distribution	60 967
24 Corsage	AT/LU/DE/FR	Marie Kreutzer	IFC Films	58 415
25 Eo	PL/IT	Jerzy Skolimowski	Janus Films	55 102

Note: A total of 165 European films (including 6 EUR inc films) were identified among the top 955 films on release in the US and Canada in 2022, generating cumulative admissions of 6.9 million (0.8% market share).

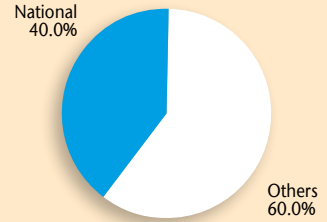
(1) ...RO/KH/QA

Sources: Comscore, OBS/LUMIERE

France

Population 2023 ^e	68.1 million
GDP per capita 2023 ^e	46 315 USD
Gross box office 2023 ^e	1.33 bn EUR (1.44 bn USD)
Admissions 2023 ^e	180.4 million
Average ticket price 2023 ^e	7.4 EUR (8.0 USD)
Average admissions per capita 2023 ^e	2.7
Screens 2022 2023	6 298 6 616

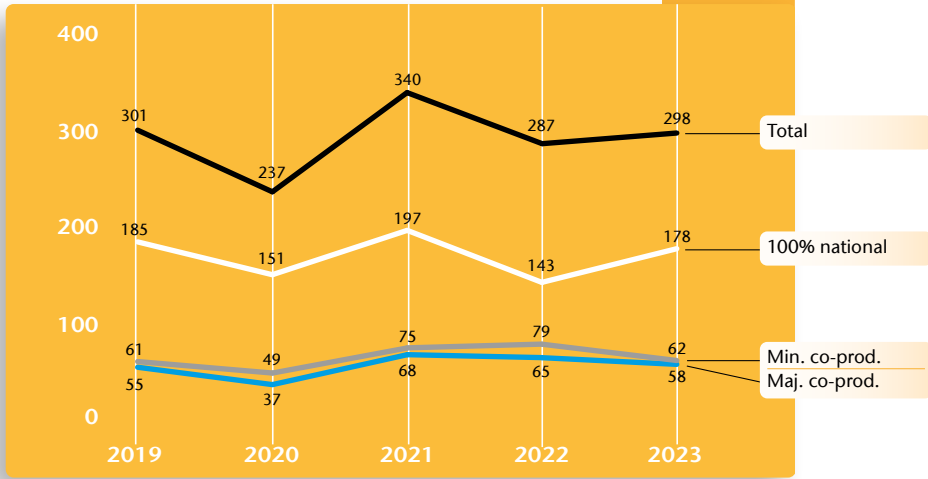
Market shares 2023^e



Number of French feature films produced | 2019-2023⁽¹⁾

In units.

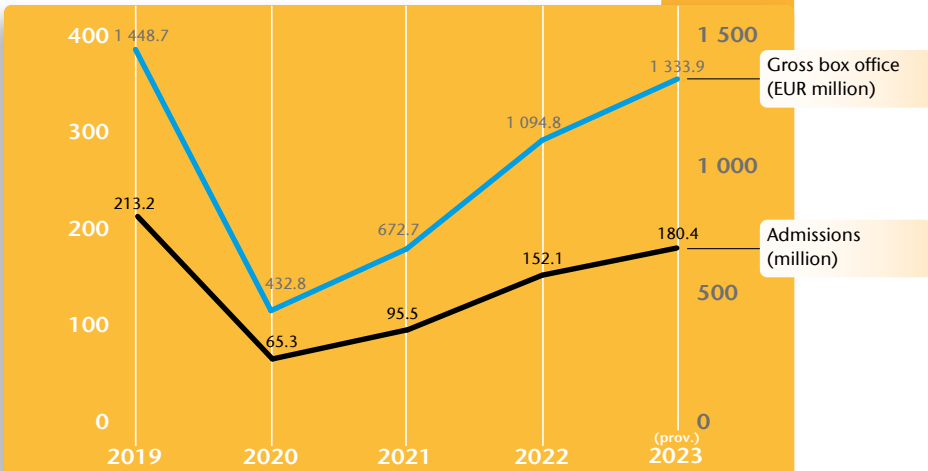
Source: CNC



(1) Officially recognised films.

Admissions and gross box office in France | 2019-2023

Source: CNC



Top 20 films by admissions in France | 2023

	Original title	Country of origin	Director(s)	Distributor	Admissions
1	Avatar: The Way of Water	US	James Cameron	Disney	8 250 379
2	The Super Mario Bros. Movie	US/JP	A. Horvath, M. Jelenic, ... ⁽¹⁾	Universal	7 375 873
3	Barbie	US/GB	Greta Gerwig	Warner Bros.	6 028 002
4	Astérix & Obélix: L'Empire du Milieu	FR	Guillaume Canet	Pathé	4 623 977
5	Oppenheimer	US/GB	Christopher Nolan	Universal	4 496 915
6	Alibi.com 2	FR	Philippe Lacheau	StudioCanal	4 258 248
7	Guardians of the Galaxy Vol. 3	US	James Gunn	Disney	3 641 371
8	Les trois mousquetaires: D'Artagnan	FR	Martin Bourboulon	Pathé	3 437 702
9	Elemental	US	Peter Sohn	Disney	3 377 084
10	Indiana Jones and the Dial of Destiny	US	James Mangold	Disney	3 073 038
11	Mission: Impossible - Dead Reckoning...	US	Christopher McQuarrie	Paramount	2 621 892
12	Creed III	US	Michael B. Jordan	Warner Bros.	2 388 938
13	Fast X	US	Louis Leterrier, Justin Lin	Universal	2 380 889
14	PAW Patrol: The Mighty Movie	US/CA	Cal Brunner	Paramount	2 311 464
15	Spider-Man: Across the Spider-Verse	US	J. Dos Santos, K. Powers, ... ⁽²⁾	Sony	1 936 660
16	The Little Mermaid	US	Rob Marshall	Disney	1 906 031
17	3 jours max (Only 3 Days Left)	FR	Tarek Boudali	StudioCanal	1 883 515
18	Meg 2: The Trench	US/CN	Ben Wheatley	Warner Bros.	1 776 052
19	Wish	US	C. Buck, F. Veerasunthorn	Disney	1 758 972
20	Ant-Man and the Wasp: Quantumania	US	Peyton Reed	Disney	1 674 907

(1) Pierre Leduc, Fabien Polack (2) Justin K. Thompson

Source: CNC

Distribution and exhibition

2023 was a good year for the French cinema industry. Admissions grew by 19% to 180.4 million, just 13% below the below the pre-pandemic average of 208 million. With a *recovery rate* of 87% France was among the top 4 European markets. Driven by a continued increase in ticket prices GBO grew by 22% from EUR 1.09 billion to EUR 1.33 billion in 2023, only 4% lower than the EUR 1.39 billion generated on average between 2017 and 2019. The number of screens in France reached a recent record high of 6 616 in 2023.

A total of 42 films sold more than 1 million tickets in 2023, compared to 28 in 2022 and an average of 50 films before the pandemic. The year-on-year growth was mainly driven by a continued strong performance of local as well as US studio titles. Led by comedy franchises, *Astérix & Obélix: L'Empire du Milieu* (FR) and *Alibi.com 2* (FR) a total of four French productions featured among the top 20 films, compared to five in 2022. Cumulatively French films captured 40.0% of total admissions, marking the fourth consecutive year of national market share remaining above pre-pandemic levels (37%). US films accounted for 41%, the lowest level in recent years, and other international films captured a record 17.5% of total admissions.

Production and funding

A total of 298 feature films were officially approved by the country's national funding body, the CNC, in 2023, matching pre-pandemic production levels. While the number of 100% national productions increased to 178 films, the number of co-productions, particularly minority co-productions, decreased from a record high of 144 in 2022 to 120 films. In terms of genre, the number of documentaries declined to 40 films, the lowest level since 2014, while there was an increase in animation films (18 films, +11 compared to pre-pandemic average). The mean production cost of French initiative films increased for the third year in a row and reached EUR 4.8 million, the highest level since 2017 (EUR 4.9 million). Films with budgets between EUR 1 and 4 million accounted for 42% of all films produced in 2023, which is the highest share since 2009 and indicates an upturn in the number of mid-budget films.

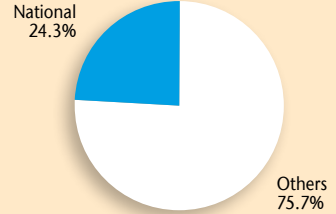
Total investment in film production in France (including foreign productions) increased from EUR 1.18 billion to EUR 1.34 billion in 2023, well above the pre-pandemic average of EUR 1.19 billion. As part of its EUR 350 million *Grande Fabrique de l'image* initiative the French government announced plans to heavily invest in studios, technology and training. The objective is to double the surface of studios to host an increasing number of national and international productions attracted by France's four tax incentive schemes.

Sources: CNC, Screen International, OBS

Germany

Population 2023 ^e	84.4 million
GDP per capita 2023 ^e	52 824 USD
Gross box office 2023 ^e	929.1 M EUR (1.01 bn USD)
Admissions 2023 ^e	95.7 million
Average ticket price 2023 ^e	9.7 EUR (10.5 USD)
Average admissions per capita 2023 ^e	1.1
Screens 2022 2023	4 911 4 901

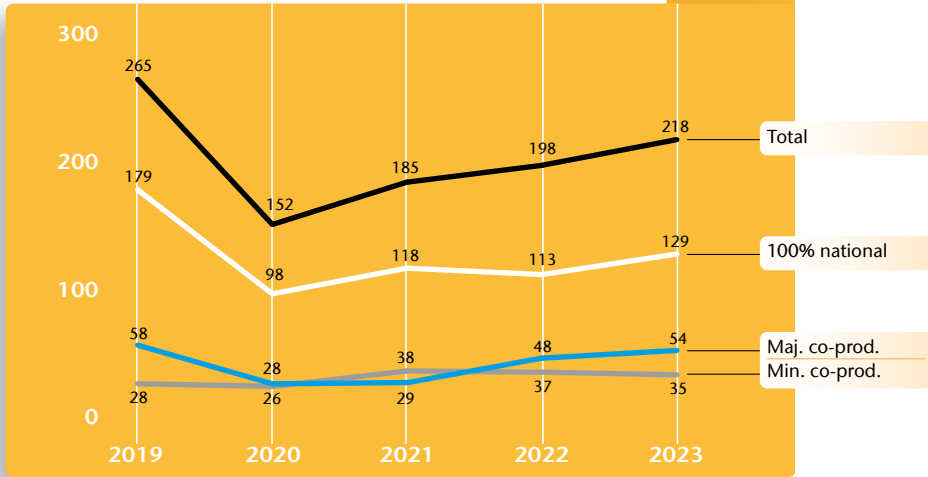
Market shares 2023^e



Number of German feature films produced | 2019-2023⁽¹⁾

In units.

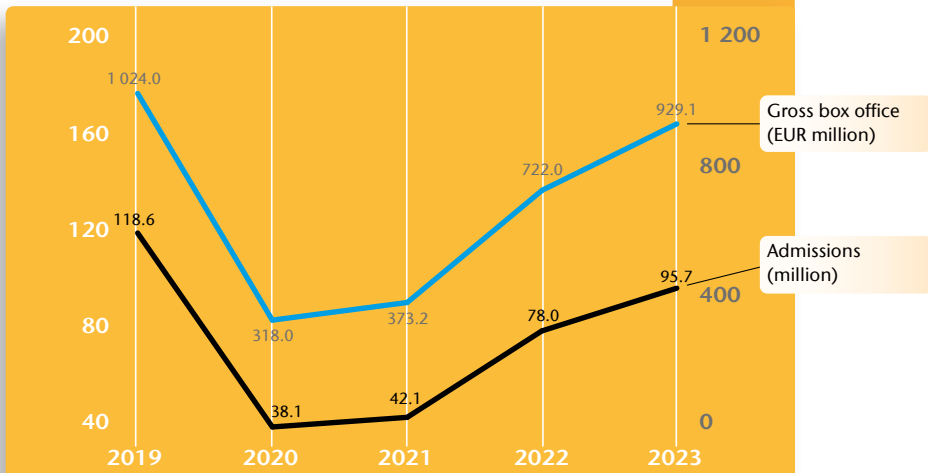
Source: SPIO



(1) Films on first release.

Admissions and gross box office in Germany | 2019-2023

Source: FFA



Top 20 films by admissions in Germany | 2023

Original title	Country of origin	Director(s)	Distributor	Admissions
1 Barbie	US/GB	Greta Gerwig	Warner Bros. ⁽¹⁾	5 981 089
2 Avatar: The Way of Water	US	James Cameron	Disney	5 671 543
3 The Super Mario Bros. Movie	US/JP	A. Horvath, M. Jelenic, ... ⁽²⁾	Universal	5 294 025
4 Oppenheimer	US/GB	Christopher Nolan	Universal	4 115 398
5 Elemental	US	Trip Jennings	Disney	2 069 699
6 Guardians of the Galaxy Vol. 3	US	James Gunn	Disney	2 002 576
7 John Wick: Chapter 4	US/DE	Chad Stahelski	Leonine Distr.	1 728 318
8 Puss in Boots: The Last Wish	US	Joel Crawford, Januel Mercado	Universal	1 639 871
9 Die drei ??? - Erbe des Drachen	DE	Tim Dünschede	Sony	1 584 204
10 Fast X	US	Louis Leterrier	Universal	1 578 049
11 Rehragout-Rendezvous	DE	Ed Herzog	Constantin Film	1 513 203
12 Wonka	US/GB	Paul King	Warner Bros. ⁽¹⁾	1 457 028
13 Wish	US	C. Buck, F. Veerasunthorn	Disney	1 443 753
14 Indiana Jones and the Dial of...	US	James Mangold	Disney	1 393 415
15 PAW Patrol: The Mighty Movie	US/CA	Cal Brunker	Paramount	1 378 108
16 The Little Mermaid	US	Rob Marshall	Disney	1 293 525
17 Miraculous: Le Film	FR	Jeremy Zag	StudioCanal	1 284 941
18 The Hunger Games: The Ballad...	US/CA	Francis Lawrence	Leonine Distr.	1 281 363
19 Mission: Impossible - Dead...	US	Christopher McQuarrie	Paramount	1 259 453
20 Manta, Manta - Zwoter Teil	DE	Til Schweiger	Constantin Film	1 249 950

(1) Warner Bros. Entertainment Germany

(2) Pierre Leduc, Fabien Polack

Source: FFA

Distribution and exhibition

The German box office market developed better than expected in 2023 while remaining 17% below the average pre-pandemic admissions level of 115 million registered between 2017 and 2019. A total of 95.7 million cinema tickets were sold throughout Germany in 2023, up 23% on 2022. Driven by a continued increase in ticket prices, GBO grew by 29% from EUR 722 million to EUR 929 million, only 6% below the pre-pandemic average. With a total of 598 films released in German cinemas in 2023 the number of first releases climbed back to pre-pandemic levels, even though the release volume of US films continued to remain comparatively low. In total, 2 664 films were screened at least once in one of the 1 744 cinemas operational in 2023. The German screen base continued to remain stable at 4 901 screens.

While not a single film managed to sell more than 5 million tickets in Germany in 2022, a total of three US blockbusters did so in 2023: *Barbie* (6.0 million tickets sold), *Avatar: The Way of Water* (5.7 million) and *The Super Mario Bros. Movie* (5.3 million). US films accounted for 16 out of the top 20 films and cumulatively captured 64% of total admissions. A total of 24 films sold more than 1 million tickets in 2023, compared to 19 films in 2022 and 25 films in 2019. Among them seven German productions led by the US/DE co-productions *John Wick: Chapter 4* (1.7 million),

Die drei ??? - Erbe des Drachen (1.6 million) and *Rehragout-Rendezvous* (1.5 million). Cumulatively German films captured a market share of 24.3%, compared to 27.0% in 2022.

Production and funding

German production figures are officially measured in terms of film releases, which continued to increase from 198 films in 2022 to 218 films in 2023, but are still well below the 2019 level of 265 national film releases.

Cumulatively the FFA and the Ministry of Culture as well as the nine German regional film funds had a budget of EUR 534 million to support the German film and audiovisual sector in 2023. In February 2024 the Ministry of Culture laid out its plans for a major reform of Germany's films law (FFG). The proposal includes the introduction of a non-capped, automatic 30% non-repayable rebate on the German spend of films and high-end series. This new incentive scheme would replace the German Federal Film Fund (DFFF) and the German Motion Picture Fund (GMPF). FFA's funding would be allocated on automatic rather than selective basis. The new film law furthermore foresees an investment obligation for VOD services to reinvest 20% of their local turnover in European productions with 70% of this going to original German language productions. If passed by the Bundestag, the changes will come into effect in early 2025.

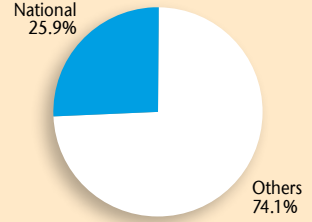
Sources: FFA, SPIO, Screen Daily, OBS

Italy

Population 2023 ^e	58.9 million
GDP per capita 2023 ^e	37 146 USD
Gross box office 2023 ^e	529.2 M EUR (573 M USD)
Admissions 2023 ^e	75.9 million
Average ticket price 2023 ^e	7.0 EUR (7.5 USD)
Average admissions per capita 2023 ^e	1.3
Screens 2022 2023 ⁽¹⁾	3 412 3 484

(1) Commercial screens covered by Cinetel, including open air cinemas.

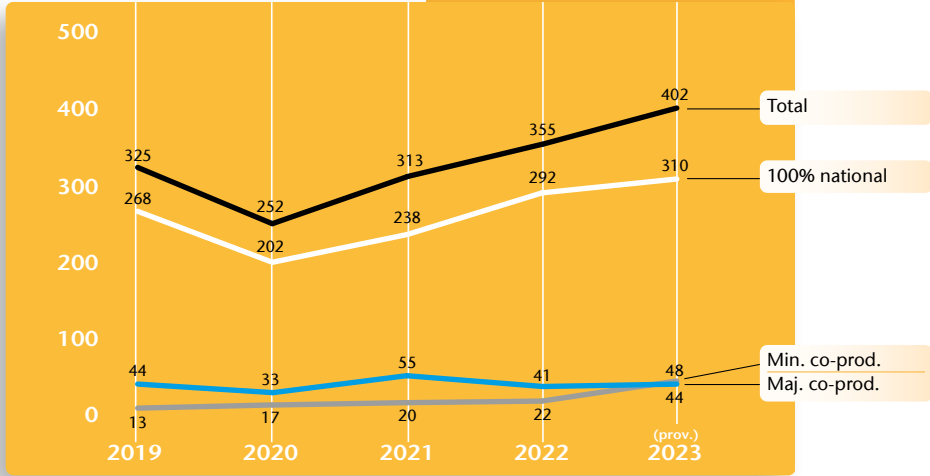
Market shares 2023^e



Number of Italian feature films produced | 2019-2023 *prov.*

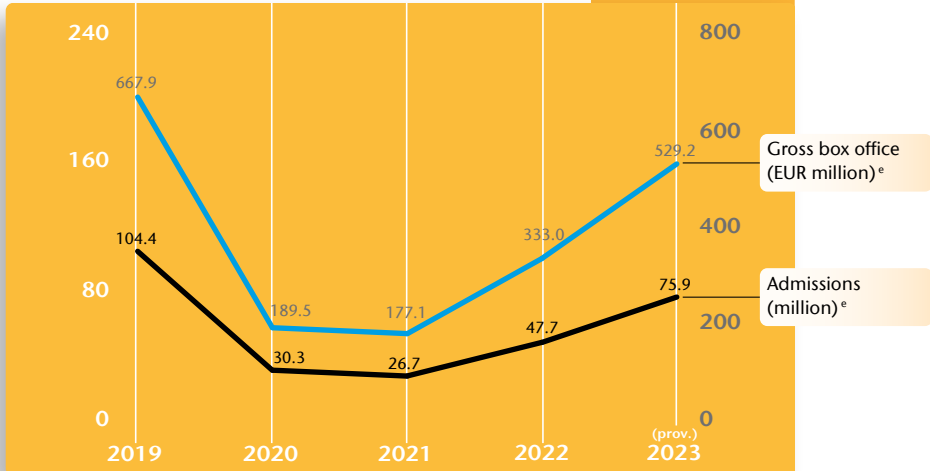
In units.

Sources: DG Cinema et audiovisivo - MiC



Admissions and gross box office in Italy | 2019-2023^e

Sources: SIAE, Cinetel



Top 20 films by admissions in Italy | 2023

Original title	Country of origin	Director(s)	Distributor	Admissions
1 <i>C'è ancora domani</i> (There's Still...)	IT	Paola Cortellesi	Universal/... ⁽¹⁾	4 840 575
2 <i>Barbie</i>	US/GB	Greta Gerwig	Warner Bros.	4 390 410
3 <i>Oppenheimer</i>	US/GB	Christopher Nolan	Universal	3 748 968
4 <i>The Super Mario Bros. Movie</i>	US/JP	A. Horvath, M. Jelenic, ... ⁽²⁾	Universal	2 805 789
5 <i>Avatar: The Way of Water</i>	US	James Cameron	Disney	1 914 526
6 <i>The Little Mermaid</i>	US	Rob Marshall	Disney	1 809 217
7 <i>Fast X</i>	US	Louis Leterrier	Universal	1 524 067
8 <i>A Haunting in Venice</i>	US	Kenneth Branagh	Disney	1 459 057
9 <i>Guardians of the Galaxy Vol. 3</i>	US	James Gunn	Disney	1 452 098
10 <i>Wonka</i>	US/GB	Paul King	Warner Bros.	1 320 414
11 <i>Napoleon</i>	US/GB	Ridley Scott	Eagle Pictures	1 040 796
12 <i>Spider-Man: Across the Spider-Verse</i>	US	J. Dos Santos, K. Powers, ... ⁽³⁾	Eagle Pictures	1 016 925
13 <i>Elemental</i>	US	Peter Sohn	Disney	1 010 810
14 <i>The Nun II</i>	US	Michael Chaves	Warner Bros.	960 620
15 <i>Creed III</i>	US	Michael B. Jordan	Warner Bros.	917 936
16 <i>Indiana Jones and the Dial of...</i>	US	James Mangold	Disney	865 278
17 <i>Ant-Man and the Wasp: Quantum...</i>	US	Peyton Reed	Disney	810 559
18 <i>Io capitano</i>	IT/BE/FR	Matteo Garrone	01 Distrib.	795 483
19 <i>John Wick: Chapter 4</i>	US/DE	Chad Stahelski	01 Distrib.	745 810
20 <i>Me contro Te - il Film: Missione...</i>	IT	Gianluca Leuzzi	Warner Bros.	740 502

(1) Vision Distribution (IT)

(2) Pierre Leduc, Fabien Polack

(3) Justin K. Thompson

Source: Cinetel

Distribution and exhibition

Italy was one of the countries struggling hardest to recover from the pandemic. In 2023, however, the Italian box office made big strides, registering by far the largest growth rate of any of the larger European markets with admissions jumping by 59% from 47.7 million to 75.9 million, logging in at 77% of the pre-pandemic average. In contrast to most other European markets average ticket prices did not increase causing GBO to grow proportionally by 59% from EUR 333 million to an estimated EUR 529 million, down 15% on pre-pandemic levels. The number of first releases jumped to a record 736 films released theatrically in 2023, pulverising the pre-pandemic average of 529 films. This increase was mostly driven by an increase in Italian films which represented 47% of the total number of first releases.

Thirteen films sold more than 1 million tickets, compared to 9 in 2022 and 26 films in 2019. While US studio titles represented 17 out of the top 20 films, it was an Italian film which topped the charts: *C'è ancora domani*, a black and white comedy drama set in the 1940s, sold more than 4.8 million tickets, ahead of *Barbie* (US) (4.4 million) and *Oppenheimer* (US) (3.7 million). Driven by this breakout success, Italian films cumulatively captured 25.9% of total admissions and grew their admissions back to pre-pandemic averages. In contrast, admissions to US films - while also driving box office recovery - remained

35% below their pre-pandemic average. US films cumulatively captured 54% of total admissions, compared to a pre-pandemic average of 63%.

Production and funding

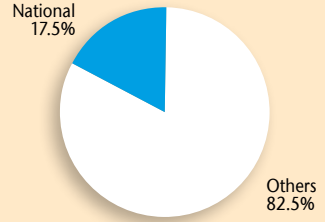
Seemingly unaffected by the theatrical crisis years, Italian feature film production continued to boom in 2023 reaching a record high of 402 films, compared to an annual average of 278 films before the pandemic. The ongoing production boom in national and international film, TV and streaming content is fueled by Italy's tax credit which saw state funding practically double from EUR 400 million in 2019 to EUR 800 million in 2022 and was increased from 30% to 40% of total production costs in 2022. According to media reports, the Italian government is however considering a reform of its tax credit scheme, directing it more towards productions which can hope to secure meaningful distribution as well as countering increasing production costs, which some consider to be a knock-on effect of the increasing production volume triggered by the scheme. The uncertainty regarding the potential reform, including the possibility of reducing investment obligations for streamers (currently set at 20% of their local revenues), may put a dent into the growth trend of Italian production spending in 2024.

Sources: Ministero della Cultura - DG Cinema et audiovisivo, ANICA, Cinetel, *Variety*, *Screen International*, OBS

Spain

Population 2023 ^e	48.1 million
GDP per capita 2023 ^e	33 090 USD
Gross box office 2023 ^e	491.2 M EUR (531.7 M USD)
Admissions 2023 ^e	76.4 million
Average ticket price 2023 ^e	6.4 EUR (7.0 USD)
Average admissions per capita 2023 ^e	1.6
Screens 2022 2023	3 638 3 605

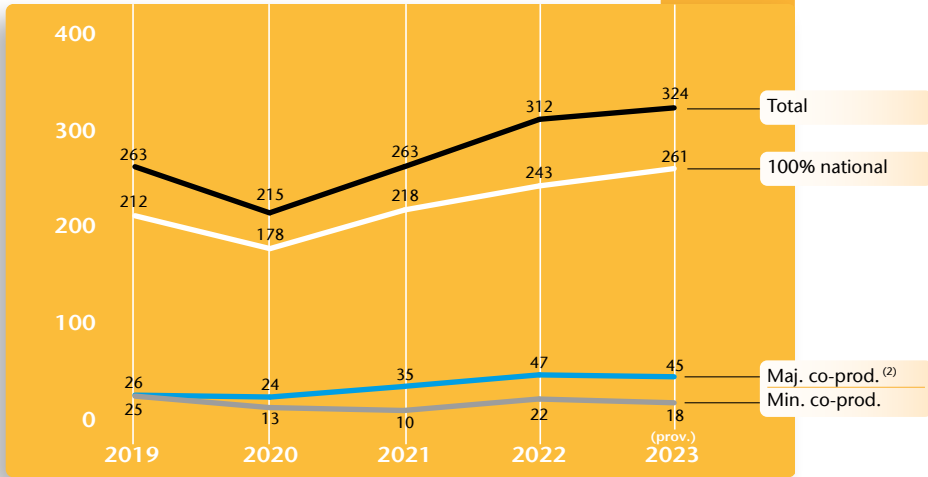
Market shares 2023^e



Number of Spanish feature films produced | 2019-2023⁽¹⁾

In units.

Source: ICAA

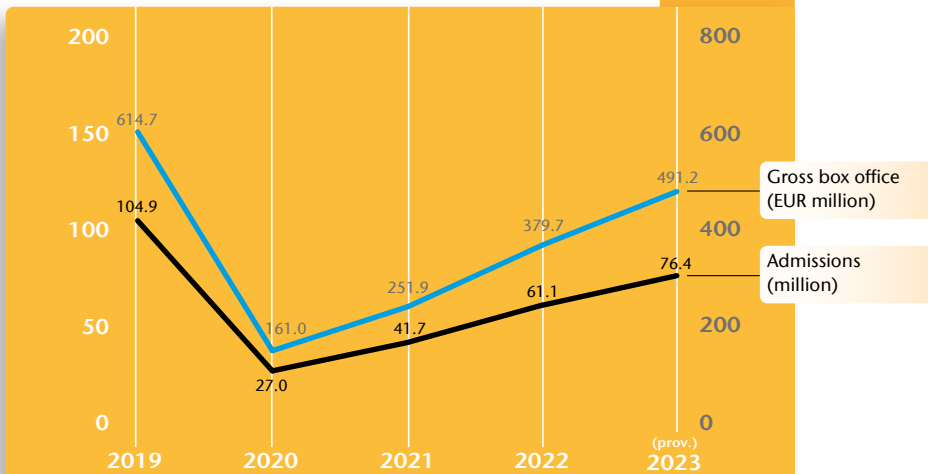


(1) Films certified, excluding experiemental features (15 in 2023, 9 in 2022, 12 in 2021, 6 in 2020, 2 in 2019).

(2) Including parity co-productions.

Admissions and gross box office in Spain | 2019-2023 prov.

Source: ICAA



Top 20 films by admissions in Spain | 2023 prov.

Original title	Country of origin	Director(s)	Distributor	Admissions ^{prov.}
1 Barbie	US/GB	Greta Gerwig	Warner Bros.	5 212 242
2 The Super Mario Bros. Movie	US/JP	A. Horvath, M. Jelenic, ... ⁽¹⁾	Universal	4 373 494
3 Avatar: The Way of Water	US	James Cameron	Disney	3 298 047
4 Oppenheimer	US/GB	Christopher Nolan	Universal	3 082 263
5 Elemental	US	Peter Sohn	Disney	2 094 517
6 Campeonex (Championext)	ES	Javier Fesser	Universal	1 945 125
7 Fast X	US	Louis Leterrier, Justin Lin	Universal	1 866 713
8 The Little Mermaid	US	Rob Marshall	Disney	1 839 383
9 Guardians of the Galaxy Vol. 3	US	James Gunn	Disney	1 811 633
10 Meg 2: The Trench	US/CN	Ben Wheatley	Warner Bros.	1 785 707
11 Indiana Jones and the Dial of...	US	James Mangold	Disney	1 739 079
12 Wonka	US/GB	Paul King	Warner Bros.	1 464 340
13 Napoleon	US/GB	Ridley Scott	Sony	1 353 908
14 Ocho apellidos marroquí	ES	Álvaro Fernández Armero	Universal	1 289 884
15 Spider-Man: Across the Spider-Verse	US	J. Dos Santos, K. Powers, ... ⁽²⁾	Sony	1 275 396
16 Puss in Boots: The Last Wish	US	J. Crawford, J. Mercado	Universal	1 243 679
17 Vacaciones de verano	ES	Santiago Segura	Sony	1 219 724
18 Five Nights at Freddy's	US	Emma Tammi	Universal	1 055 517
19 The Hunger Games: The Ballad of...	US/CA	Francis Lawrence	Vértice Cine	1 055 350
20 The Nun II	US	Michael Chaves	Warner Bros.	1 024 635

(1) Pierre Leduc, Fabien Polack

(2) Justin K. Thompson

Source: ICAA

Distribution and exhibition

Like Italy, Spain was among the European markets with the lowest recovery rate in 2022 but caught up in 2023 registering an above average annual growth rate with cinema attendance growing by 25%, from 61.1. million to an estimated 76.4 million tickets sold in 2023. Despite this growth, Spanish 2023 admissions levels were still 25% below the average pre-pandemic 2017-2019 admissions level of 101 million. Driven by an increase in ticket prices, GBO climbed 29% from EUR 378 million to EUR 491 million, down by -18% on Spain's pre-pandemic average of EUR 597 million. Like in the rest of Europe, the number of cinema screens remained comparatively stable at 3 605 screens operational in 2023, this compares to its recent high point of 3 701 screens in 2020.

Box office growth was primarily driven by US blockbusters, as cumulative admissions to Spanish films stagnated just above 13 million (20% below the pre-pandemic average) accounting for a market share of 17.5% of total admissions, down from 22% in 2022. Three local films, all of them comedies, featured among the top 20 titles which was otherwise dominated by US studio titles: *Campeonex* (1.9 million tickets), the sequel to 2018's breakout success *Campiones*, *Ocho apellidos marroquí* (1.3 million) and *Vacaciones de Verano* (1.2 million). Based on provisional data, a total of 20 films sold more than one million tickets in 2023, compared to a pre-pandemic average of

about 30 films. Some experts saw a certain lack of commercial Spanish films, partly linking it to the growing participation of streamers in financing Spanish productions with some potential hits going directly to platforms or having only a limited release in theatres, leading to a certain resurgence of local auteur films in Spanish cinemas.

Production and funding

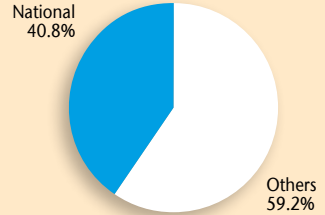
Ignoring comparatively low box office results, Spanish film production volume reached another record high of 324 films certified in 2023. This means 12 films more than the previous record set in 2022 and compares to an annual average of 257 films certified between 2017 and 2019. The increase in production levels has without doubt been spurred on by the government's *Spain Audiovisual Hub* plan, providing public investments of EUR 1.6 billion between 2021 and 2025 to increase film and TV production in the country by 30%. In 2023 Spain increased its international film and TV production incentives (up to 30%) raising caps up to EUR 20 million per film and to EUR 10 million for any single episode. Apart from the national incentive scheme there are regional incentive schemes in Navarre (35%-40% tax credit), the Canary Islands (50% tax rebate) and Biscay (70% tax credit). Like in Italy, production costs are reported to have increased significantly over the past years alongside the production boom.

Sources: ICAA, *Screen International*, *Variety*, OBS

United Kingdom

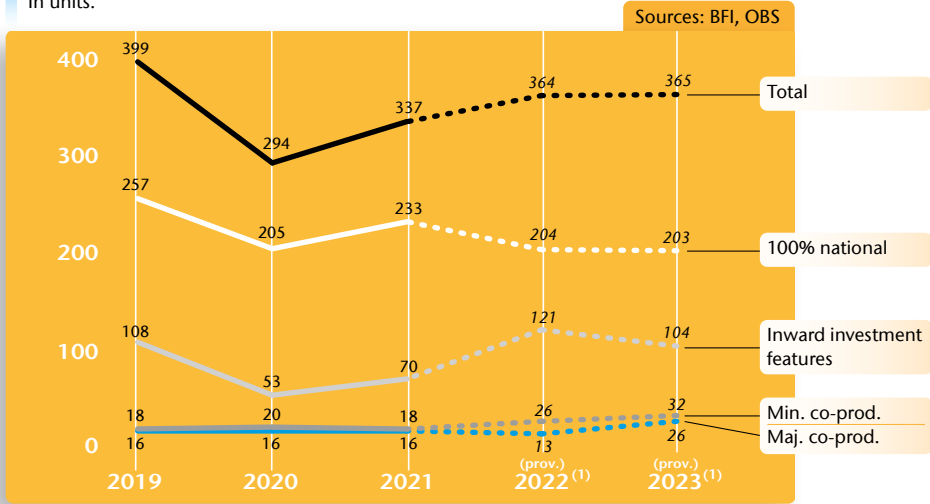
Population 2023 ^e	68.4 million
GDP per capita 2023 ^e	48 913 USD
Gross box office 2023 ^e	979.7 M GBP (1.22 bn USD)
Admissions 2023 ^e	123.6 million
Average ticket price 2023 ^e	7.9 GBP (9.9 USD)
Average admissions per capita 2023 ^e	1.8
Screens 2022 2023	4 720 4 749

Market shares 2023^e



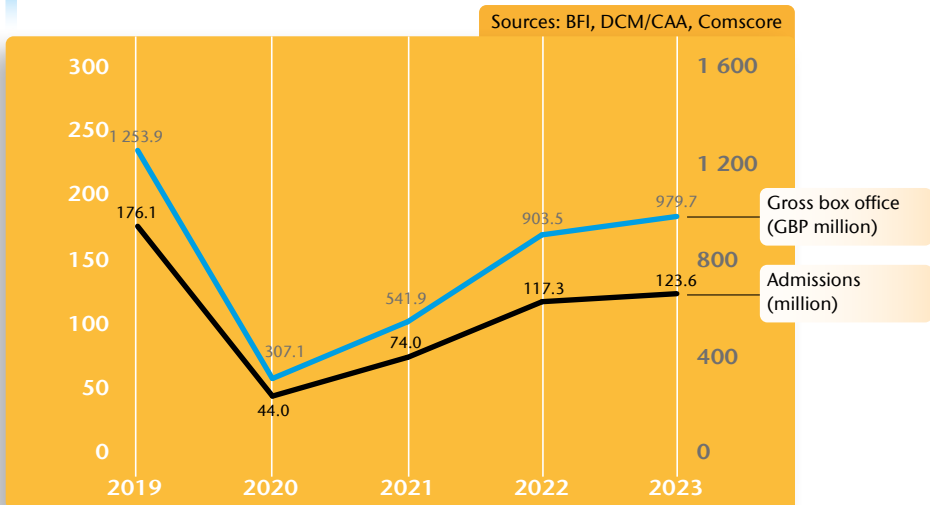
Number of films produced in the United Kingdom | 2019-2023 *prov.* ⁽¹⁾

In units.



(1) Figures refer to films starting principal photography. Figures for 2022 and 2023 are provisional Observatory estimates based on interim BFI figures to adjust for a time lag in identifying film productions with budgets below GBP 500 000.

Admissions and gross box office in the United Kingdom | 2019-2023



Top 20 films by admissions in the United Kingdom and Ireland | 2023^e

Estimated admissions based on average ticket price of GBP 7.93.

Original title	Country of origin	Director(s)	Distributor	Admissions ^e
1 Barbie	US/GB	Greta Gerwig	Warner Bros.	12 059 702
2 Oppenheimer	US/GB	Christopher Nolan	Universal	7 354 193
3 The Super Mario Bros. Movie	US/JP	A. Horvath, M. Jelenic, ... ⁽¹⁾	Universal	6 874 310
4 Wonka	US/GB	Paul King	Warner Bros.	5 531 238
5 Guardians of the Galaxy Vol. 3	US	James Gunn	Disney	4 628 485
6 Avatar: The Way of Water	US	James Cameron	Disney	4 301 006
7 Spider-Man: Across the Spider-Verse	US	J. Dos Santos, K. Powers, ... ⁽²⁾	Sony	3 883 469
8 The Little Mermaid	US	Rob Marshall	Disney	3 440 877
9 Mission: Impossible - Dead...	US	Christopher McQuarrie	Paramount	3 350 245
10 Puss in Boots: The Last Wish	US	J. Crawford, J. Mercado	Universal	3 263 111
11 Indiana Jones and the Dial of...	US	James Mangold	Disney	2 563 889
12 Ant-Man and the Wasp: ...	US	Peyton Reed	Disney	2 425 398
13 Elemental	US	Peter Sohn	Disney	2 333 196
14 John Wick: Chapter 4	US/DE	Chad Stahelski	Lionsgate	2 208 474
15 The Hunger Games: The Ballad of...	US/CA	Francis Lawrence	Lionsgate	2 203 609
16 Trolls Band Together	US	Tim Heitz Walt Dohrn	Universal	1 951 377
17 Fast X	US	Louis Leterrier Justin Lin	Universal	1 900 920
18 Creed III	US	Michael B. Jordan	Warner Bros.	1 796 894
19 Napoleon	US/GB	Ridley Scott	Sony	1 725 044
20 Dungeons & Dragons: ...	US/CA/... ⁽³⁾	J. F. Daley, J. Goldstein	Entertain. One	1 721 882

(1) Pierre Leduc, Fabien Polack

(2) Justin K. Thompson

(3) ...GB/IS/AU

Sources: BFI, Screen Ireland, Comscore

Distribution and exhibition

While most other European markets registered strong growth rates in 2023, UK admissions increased by only 5% to 124 million, 29% below the pre-pandemic average. In terms of *recovery rate* the UK therefore ranked among the lowest performing markets in Europe by the end of 2023. GBO grew by 8% to GBP 980 million, 22% below the pre-pandemic average. In spite of Cineworld, the leading UK cinema chain, filing for bankruptcy in 2022 the number of commercial cinema screens has not dropped significantly since the pandemic, counting 4 749 screens in 2023, compared to 4 782 screens in 2019.

A total of 824 films were released during 2023, the highest level in recent history, with 33 films selling more than one million tickets, compared to 47 films in 2019. US films captured a market share of 52.2%. The market share for UK qualifying films, including *Barbie* (US/GB) and *Oppenheimer* (US/GB), increased from 29.6% to 40.8%, with UK qualifying US studio backed titles accounting for a record 37% as the share of UK independent titles plummeted to a record low of 3.8%.

Production and funding

According to BFI interim figures, a total of 207 of UK feature film productions - including 74 inward

investment films – started principal photography in 2023. Considering the time lag in measuring production⁽¹⁾, the Observatory estimates that the final figure to represent around 365 films, indicating a stable level of production activity in the UK. Strike actions in the US impacted UK production spend which was reported to amount to GBP 1.36 billion, which is 31% lower than the GBP 1.97 billion initially reported for 2022. 77% of the production spend in 2023 can be attributed to inward investment films.

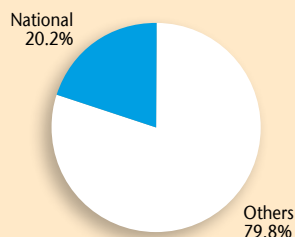
The UK government recently announced additional major updates for its tax relief system which attracted billions of pounds in inward investments from US studios and streamers but has done little for the struggling UK independent production sector, which has been competing with inward investment productions for talent, IP rights, crew and studio space. Addressing this issue, the UK will introduce a 40% Independent Film Tax Credit (ITFC) available to UK qualifying film productions with a budget of up to GBP 15 million. In addition, a 40% relief on business rates for studio facilities in England will be introduced and the tax relief for UK visual effects will be increased by 5% to 39%.

Sources: British Film Institute (BFI), DCM, Comscore, *Screen International*, OBS

Poland

Population 2023 ^e	36.8 million
GDP per capita 2023 ^e	22 393 USD
Gross box office 2023 ^e	927.1 M PLN (221.1 M USD)
Admissions 2023 ^e	49.8 million
Average ticket price 2023 ^e	18.6 PLN (4.4 USD)
Average admissions per capita 2023 ^e	1.4
Screens 2022 2023 ^e	1 570 1 600
National films produced 2022 2023	84 55

Market shares 2023^e



Top 10 films by admissions in Poland | 2023 *prov.*

Original title	Country of origin	Director(s)	Distributor	Admissions <i>prov.</i>
1 Barbie	US/GB	Greta Gerwig	Warner Bros.	2 748 408
2 Puss in Boots: The Last Wish	US	Joel Crawford, Januel Mercado	UIP	2 156 913
3 Oppenheimer	US/GB	Christopher Nolan	UIP	1 890 343
4 Avatar: The Way of Water	US	James Cameron	Disney	1 874 721
5 Chłopi (The Peasants)	PL/RS/LT	Dorota Kobiela, Hugh Welchman	Next Film	1 852 595
6 PAW Patrol: The Mighty Movie	US/CA	Cal Brunker	UIP	1 436 239
7 The Super Mario Bros. Movie	US/JP	A. Horvath, M. Jelenic, ... ⁽¹⁾	UIP	1 367 147
8 Elemental	US	Peter Sohn	Disney	942 250
9 Spider-Man: Across the Spider-Verse	US	J. Dos Santos, K. Powers, ... ⁽²⁾	UIP	834 320
10 Five Nights at Freddy's	US	Emma Tammi	UIP	816 068

(1) Pierre Leduc, Fabien Polack (2) Justin K. Thompson

Source: Polski Instytut Sztuki Filmowej (PISF)

Distribution and exhibition

According to provisional figures from the Polish Film Institute, Polish cinema attendance increased by 19% from 41.8 million in 2022 to an estimated 49.8 million tickets sold in 2023. This is only 16% below the pre-pandemic average of 59 million admissions registered between 2017 and 2019. Driven by an increase in ticket prices, which continue to slightly trail pre-pandemic price levels, GBO increased by 28% from PLN 726 million (USD 156 million) to PLN 927 million (USD 221 million), down 17% on the pre-pandemic average. In terms of recovery rate, the Polish cinema market was hence among the top 10 performing EU markets in 2023.

A total of seven films surpassed one million ticket sales, compared to an average of 14 films before the pandemic. Only one Polish film - compared to an average of four films before the pandemic - featured among the top 10 films, which was otherwise dominated by US studio titles. Led by the adult animated historical drama *Chłopi (The Peasants)* (PL) Polish films cumulatively captured a market share of around 20%, which remained well below the pre-pandemic average of 28%.

Production and funding

Theatrical film production activity in Poland dropped significantly in 2023, with the number of Polish feature films produced falling from 84 feature films completed in 2022 to 55 feature films completed in 2023. This compares to a record high of 93 films registered in 2019. Traditionally many Polish films benefit from support granted by the Polish Film Institute (PISF), which reportedly had PLN 115 million (USD 26 million) allocated for direct production support in 2023, as well as several regional funds. In addition, Poland has offered a 30% cash rebate scheme since 2019.

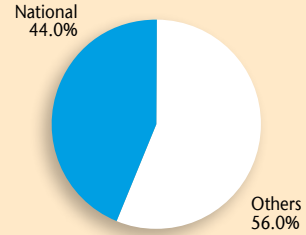
Sources: Polish Film Institute (PISF), OBS

Türkiye

Population 2023*	85.3 million
GDP per capita 2023*	13 384 USD
Gross box office 2023*	2.79 bn TRY (120.8 M USD)
Admissions 2023*	31.0 million
Average ticket price 2023*	89.9 TRY (3.9 USD)
Average admissions per capita 2023*	0.4
Screens 2022 2023* ⁽¹⁾	2 719 2 447
National films released 2022 2023	189 148

(1) Refers to screens with at least 26 playing weeks per year

Market shares 2023*



Top 10 films by admissions in Türkiye | 2023

Original title	Country of origin	Director(s)	Distributor	Admissions
1 Rafadan Tayfa Galaktik Tayfa	TR	Ismail Fidan	CGV Mars Dagitim	2 767 882
2 Oppenheimer	US/GB	Christopher Nolan	UIP	1 675 025
3 Atatürk 1881 - 1919	TR	Mehmet Ada Öztekin	CJ ENM Medya Film... ⁽¹⁾	1 589 473
4 Fast X	US	Louis Leterrier	UIP	1 556 497
5 Ölümlü Dünya 2 (Mortal World 2)	TR	Ali Atay	CJ ENM Medya Film... ⁽¹⁾	1 463 013
6 Barbie	US/GB	Greta Gerwig	TME Films	1 363 102
7 Avatar: The Way of Water	US	James Cameron	UIP	1 344 789
8 Kutsal Damacana 4	TR	Kamil Cetin	CJ ENM Medya Film... ⁽¹⁾	1 139 168
9 John Wick: Chapter 4	US/DE	Chad Stahelski	CJ ENM Medya Film... ⁽¹⁾	1 033 933
10 Puss in Boots: The Last Wish	US	J. Crawford, J. Mercado	UIP	805 880

(1) Yapim ve Dagitim

Source: Antrakt - Deniz Yavuz

Distribution and exhibition

2023 proved to be another difficult year for the Turkish film industry. Troubled by an overall difficult economic environment, Türkiye was the only European market to see a significant decline in cinema attendance in 2023, as admission decreased by 13% from 35.6 million to 31.0 million. This compares to an annual average of 67 million admissions registered between 2017 and 2019. With a recovery rate of only 46% Türkiye is lagging far behind all other European markets where cinema attendance generally grew back to 70% to 90% of its pre-pandemic values. Driven by high inflation, average ticket prices continued to soar, more than doubling from TRY 37 to TRY 90. GBO consequently jumped from TRY 1.33 billion in 2022 to TRY 2.79 billion. However, measured in USD, Turkish GBO increased only from USD 81.5 million to USD 121 million. This compares to a pre-pandemic annual average GBO of USD 200 million. A total of 488 new films were released in Turkish cinemas in 2023, compared to a pre-pandemic average of 406 films. In contrast, the number of commercial cinema screens decreased from 2 719 to 2 447 in 2023.

The drop in cinema attendance was driven entirely by a decline in admissions local films, which dropped from 18.1 million to 13.6 million

in 2023. Leaving 2021 aside, this represents the lowest level of admissions to Turkish films in recent history and caused national market share to drop to 44%, compared to 56% and 63% before the pandemic. While national films used to dominate the charts before the pandemic, only 4 Turkish films featured among the top 10 in 2023. Among them *Rafadan Tayfa Galaktik Tayfa* (TR), an animated family comedy, which sold 2.8 million tickets and became the year's most successful film.

Production and funding

According to Antrakt, a total of 202 feature films were produced in Türkiye in 2023, but only 148 Turkish films were released in cinemas. This compares to 250 and 210 feature films produced and 189 and 150 films released in 2022 and 2019, respectively. Independent Turkish producers continue to struggle with the ongoing depreciation of the Turkish lira, skyrocketing production costs and poor box office results. In 2023 the Turkish Ministry of Culture and Tourism provided TRY 145 million (USD 6.3 million) in support of cinema projects. Türkiye also offers a cash rebate of up to 30% of local spend.

Sources: DG Sinema, Antrakt - Deniz Yavuz, *Daily Sabah*, OBS

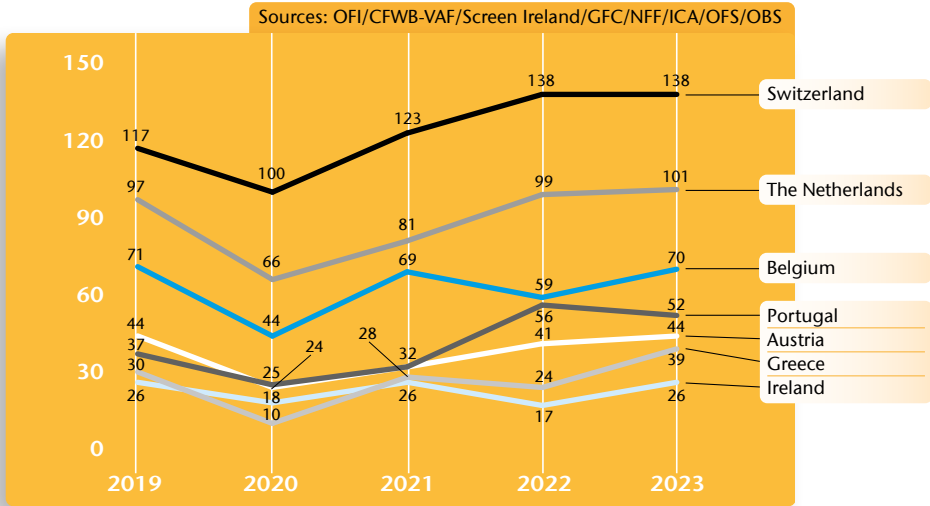
Other Western Europe

	Austria	Belgium	Greece	Ireland	Netherlands	Portugal	Switzerland
Population 2023* (million)	9.1	11.8	10.4	5.2	17.8	10.5	8.8
GDP per capita 2023* (USD)	58 013	53 657	23 173	112 248	61 770	26 879	102 866
Gross box office 2023 (M USD)	135.9	157.7	56.4	110.0	365.9	78.9	190.3
Admissions 2023 (million)	11.7	16.9	7.4	11.5	31.6	12.3	10.5
Average ticket price 2023 (USD)	11.6	9.4	7.6	9.6	11.6	6.4	18.1
Average admissions per capita 2023	1.3	1.4	0.7	1.2	1.8	1.2	1.2
Screens 2023 ^e	563	468	270	549	1 049 ⁽¹⁾	566	616
National market shares 2023 ^e	8.8%	11.7%	8.0%	2.8%	14.0%	2.7%	7.3%

(1) 2022

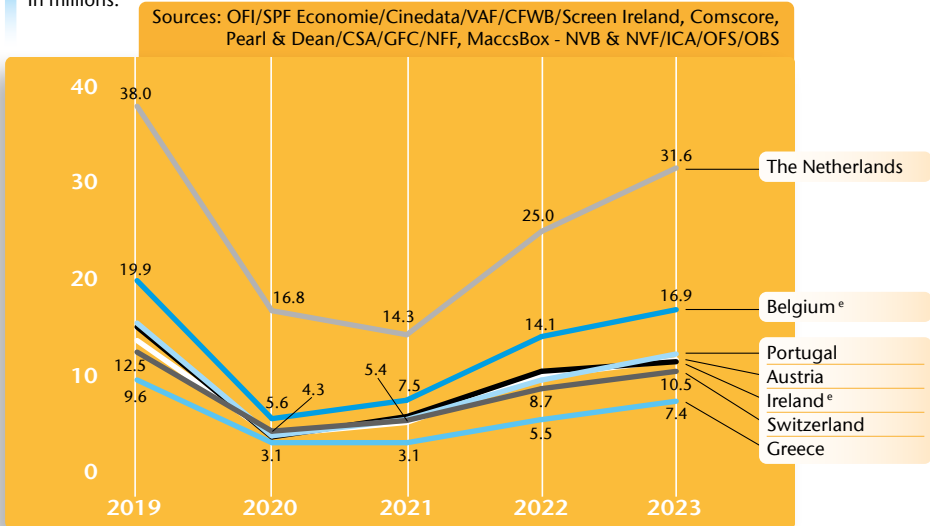
Number of feature films produced by selected Western European countries | 2019-2023

In units. Including minority co-productions and feature documentaries.



Admissions in selected Western European countries | 2019-2023

In millions.



Top 10 films by admissions in the Netherlands | 2023

	Original title	Country of origin	Director(s)	Distributor	Admissions
1	Barbie	US/GB	Greta Gerwig	Warner Bros.	1 831 833
2	Oppenheimer	US/GB	Christopher Nolan	Universal	1 690 033
3	The Super Mario Bros. Movie	US/JP	A. Horvath, M. Jelenic, ... ⁽¹⁾	Universal	1 688 374
4	Avatar: The Way of Water	US	James Cameron	Disney	1 455 715
5	Wonka	US/GB	Paul King	Warner Bros.	743 100
6	Mission: Impossible - Dead...	US	Christopher McQuarrie	Universal	591 737
7	De Tatta's (The Tattas)	NL	Jamel Aattache	Independent... ⁽²⁾	558 555
8	Elemental	US	Peter Sohn	Disney	557 513
9	The Little Mermaid	US	Rob Marshall	Disney	506 946
10	Puss in Boots: The Last Wish	US	J. Crawford, J. Mercado	Universal	496 618

(1) Pierre Leduc, Fabien Polack (2) Films Benelux

Source: MaccsBox - NVB & NVF

Top 10 films by admissions in Belgium | 2023

	Original title	Country of origin	Director(s)	Distributor	Admissions
1	Barbie	US/GB	Greta Gerwig	Warner Bros.	978 421
2	The Super Mario Bros. Movie	US/JP	A. Horvath, M. Jelenic, ... ⁽¹⁾	Sony	781 474
3	Avatar: The Way of Water	US	James Cameron	Disney	737 928
4	Oppenheimer	US/GB	Christopher Nolan	Sony	699 241
5	Elemental	US	Peter Sohn	Disney	376 959
6	Wonka	US/GB	Paul King	Warner Bros.	339 148
7	The Hunger Games: The Ballad of...	US/CA	Francis Lawrence	Belga Films	276 513
8	Napoleon	US/GB	Ridley Scott	Sony	271 022
9	Met de Joris	BE	P. van Eyndt, S. Van Alboom	–	257 021
10	Indiana Jones and the Dial of...	US	James Mangold	Disney	256 173

(1) Pierre Leduc, Fabien Polack

Sources: CFWB, VAF, Cinedata

Top 10 films by admissions in Portugal | 2023

	Original title	Country of origin	Director(s)	Distributor	Admissions
1	Barbie	US/GB	Greta Gerwig	Cinemundo	893 787
2	Fast X	US	Louis Leterrier, Justin Lin	Cinemundo	691 447
3	Oppenheimer	US/GB	Christopher Nolan	Cinemundo	552 332
4	Avatar: The Way of Water	US	James Cameron	NOS... ⁽²⁾	466 999
5	The Super Mario Bros. Movie	US/JP	A. Horvath, M. Jelenic, ... ⁽¹⁾	Cinemundo	461 071
6	Elemental	US	Peter Sohn	NOS... ⁽²⁾	385 446
7	The Little Mermaid	US	Rob Marshall	NOS... ⁽²⁾	368 179
8	Mission: Impossible - Dead...	US	Christopher McQuarrie	NOS... ⁽²⁾	356 335
9	Indiana Jones and the Dial of...	US	James Mangold	NOS... ⁽²⁾	295 280
10	Guardians of the Galaxy Vol. 3	US	James Gunn	NOS... ⁽²⁾	234 069

(1) Pierre Leduc, Fabien Polack (2) Lusomundo Audiovisuais

Source: ICA

Top 10 films by admissions in Austria | 2023

	Original title	Country of origin	Director(s)	Distributor	Admissions
1	Barbie	US/GB	Greta Gerwig	Warner Bros.	799 811
2	The Super Mario Bros. Movie	US/JP	A. Horvath, M. Jelenic, ... ⁽¹⁾	Universal	691 863
3	Griechenland	AT	C. Jüptner, E. Spreitzhofer	Filmladen	569 210
4	Oppenheimer	US/GB	Christopher Nolan	Universal	506 192
5	Avatar: The Way of Water	US	James Cameron	Disney	488 265
6	Wish	US	C. Buck, F. Veerasunthorn	Disney	391 643
7	Meg 2: The Trench	US/CN	Ben Wheatley	Warner Bros.	310 169
8	Rehragout-Rendezvous	DE	Ed Herzog	Constantin Film	308 343
9	Napoleon	US/GB	Ridley Scott	Sony	275 719
10	Elemental	US	Peter Sohn	Disney	263 660

(1) Pierre Leduc, Fabien Polack

Sources: Austrian Film Institute (OFI)/Comscore

Nordic countries

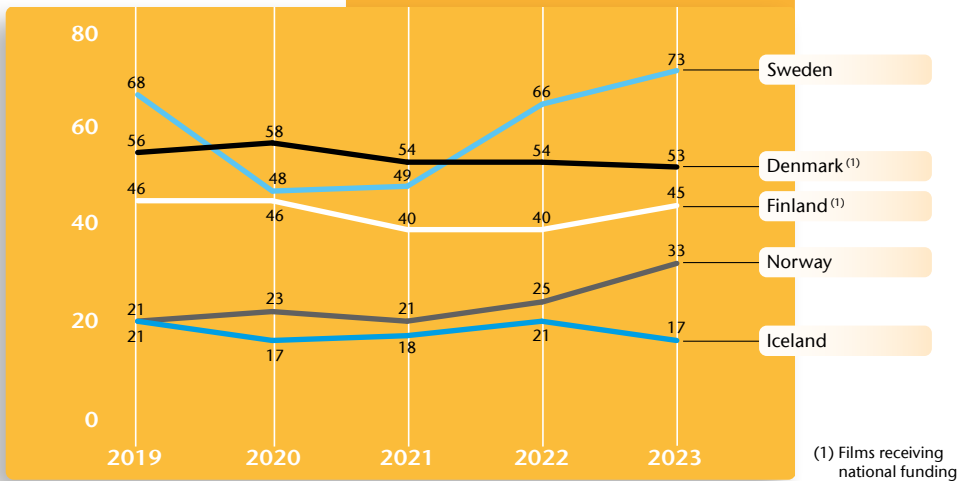
	Denmark	Finland	Iceland	Norway	Sweden
Population 2023* (million)	5.9	5.6	0.4	5.5	10.5
GDP per capita 2023* (USD)	71 402	54 507	78 837	99 266	55 216
Gross box office 2023 (M USD)	144.9	101.2	12.3	115.7	145.9
Admissions 2023 (million)	9.7	7.2	1.0	9.4	11.2
Average ticket price 2023 (USD)	14.9	14.1	12.3	12.4	13.0
Average admissions per capita 2023	1.6	1.3	2.6	1.7	1.1
Screens 2023 ^e	486	383	44	481	945 ⁽¹⁾
National market shares 2023 ^e	26.7%	23.3%	14.3%	26.9%	17.1%

(1) 2022

Number of feature films produced by Nordic countries | 2019-2023

In units. Including minority co-productions and feature documentaries.

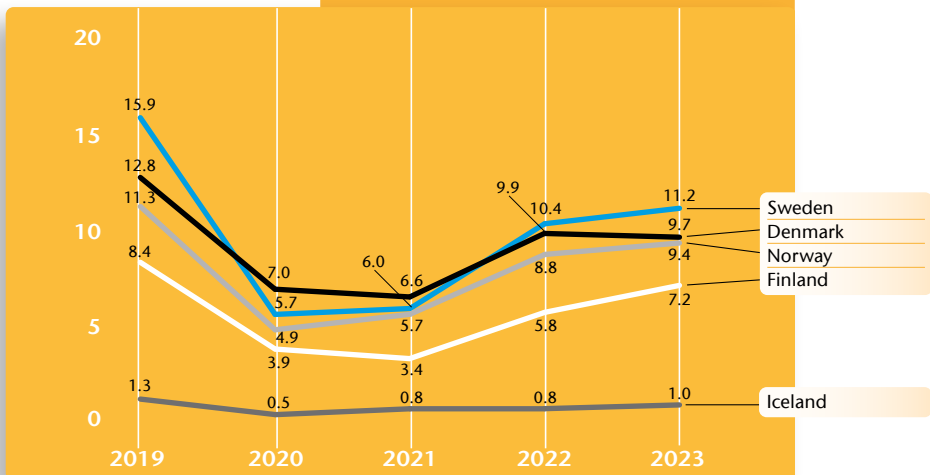
Sources: DFI/FFF/Icelandic Film Centre/NFI/SFI/OBS



Admissions in Nordic countries | 2019-2023

In millions.

Sources: DFI/FFF/HI/Icelandic Film Centre/NFI/SFI/OBS



Top 10 films by admissions in Sweden | 2023

	Original title	Country of origin	Director(s)	Distributor	Admissions
1	Barbie	US/GB	Greta Gerwig	Warner Bros.	849 183
2	Oppenheimer	US/GB	Christopher Nolan	Universal	657 430
3	The Super Mario Bros. Movie	US/JP	A. Horvath, M. Jelenic, ... ⁽¹⁾	Universal	557 484
4	Avatar: The Way of Water	US	James Cameron	Disney	492 622
5	Indiana Jones and the Dial of Destiny	US	James Mangold	Disney	277 259
6	Elemental	US	Peter Sohn	Disney	231 564
7	Mission: Impossible - Dead...	US	Christopher McQuarrie	Paramount	206 135
8	The Little Mermaid	US	Rob Marshall	Disney	206 017
9	Guardians of the Galaxy Vol. 3	US	James Gunn	Disney	202 329
10	Spider-Man: Across the Spider-Verse	US	J. Dos Santos, K. Powers, ... ⁽²⁾	Sony	195 260

(1) Pierre Leduc, Fabien Polack (2) Justin K. Thompson

Source: Comscore

Top 10 films by admissions in Denmark | 2023

	Original title	Country of origin	Director(s)	Distributor	Admissions
1	Barbie	US/GB	Greta Gerwig	Warner Bros.	639 141
2	Oppenheimer	US/GB	Christopher Nolan	United Intl Pictures	469 328
3	Avatar: The Way of Water	US	James Cameron	Disney	399 243
4	Meter i sekundet (The Land of...	DK	Hella Joof	Nordisk Film	351 100
5	The Super Mario Bros. Movie	US/JP	A. Horvath, M. Jelenic, ... ⁽¹⁾	United Intl Pictures	297 131
6	Når befrielsen kommer (Before It...	DK	Anders Walter	Nordisk Film	290 543
7	Indiana Jones and the Dial of Destiny	US	James Mangold	Disney	267 265
8	Bastarden (The Promised Land)	DK/SE/... ⁽²⁾	Nikolaj Arcel	Nordisk Film	245 115
9	Kysset (The Kiss)	DK	Bille August	Nordisk Film	221 530
10	Mission: Impossible - Dead...	US	Christopher McQuarrie	United Intl Pictures	199 567

(1) Pierre Leduc, Fabien Polack (2) ...NO/DE

Sources : Danmark Statistics/DFI

Top 10 films by admissions in Norway | 2023

	Original title	Country of origin	Director(s)	Distributor	Admissions
1	Barbie	US/GB	Greta Gerwig	Warner Bros.	662 509
2	Oppenheimer	US/GB	Christopher Nolan	United Intl Pictures	519 264
3	The Super Mario Bros. Movie	US/JP	A. Horvath, M. Jelenic, ... ⁽¹⁾	United Intl Pictures	421 979
4	Den første julen i Skomakergata	NO	Mikal Hovland	Nordisk Film	407 844
5	Kampen om Narvik - Hitlers første...	NO	Erik Skjoldbjærg	Nordisk Film	334 055
6	Avatar: The Way of Water	US	James Cameron	Disney	323 962
7	Mission: Impossible - Dead...	US	Christopher McQuarrie	United Intl Pictures	291 362
8	Folk og røvere i Kardemomme by	NO	Rasmus A. Sivertsen	Nordisk Film	205 296
9	Wonka	US/GB	Paul King	Warner Bros.	175 098
10	Bukkene Bruse på Badeland	NO	W. Ashurst, W. J. Ashurst	Nordisk Film	173 634

(1) Pierre Leduc, Fabien Polack

Source: Norwegian Film Institute

Top 10 films by admissions in Finland | 2023

	Original title	Country of origin	Director(s)	Distributor	Admissions
1	Barbie	US/GB	Greta Gerwig	Warner Bros.	680 207
2	Oppenheimer	US/GB	Christopher Nolan	Finnkino	395 321
3	The Super Mario Bros. Movie	US/JP	A. Horvath, M. Jelenic, ... ⁽¹⁾	Finnkino	286 546
4	Kuolleet lehdet (Fallen Leaves)	FI/DE	Aki Kaurismäki	B-Plan	254 717
5	Indiana Jones and the Dial of Destiny	US	James Mangold	Disney	229 506
6	Risto Rappääjä ja villi kone	FI	Maria Sid	Nordisk Film	205 475
7	Avatar: The Way of Water	US	James Cameron	Disney	199 814
8	Sisu	FI/GB	Jalmari Helander	Nordisk Film	182 771
9	Lapua 1976	FI	Toni Kurkimäki	Finnkino	171 549
10	Puss in Boots: The Last Wish	US	J. Crawford, J. Mercado	Finnkino	169 445

(1) Pierre Leduc, Fabien Polack

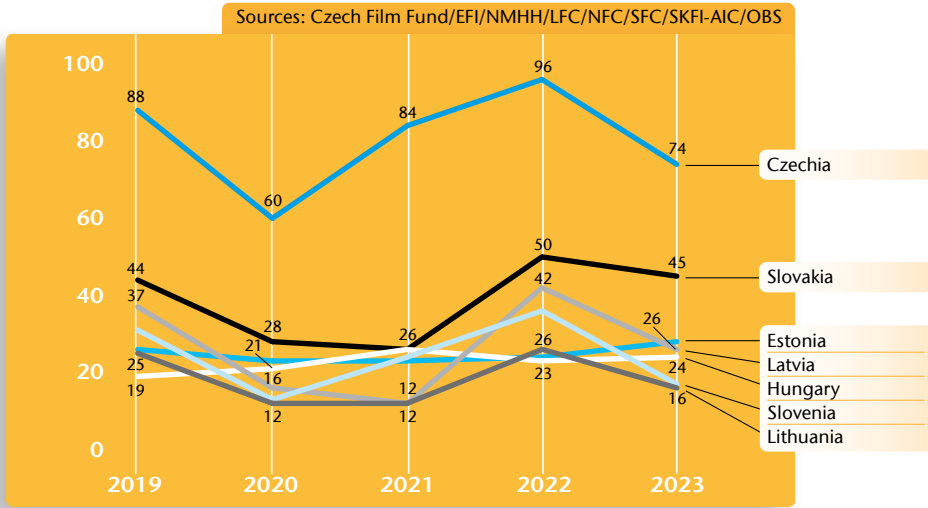
Source: Finnish Film Foundation

Baltics and Central Europe

	Czechia	Estonia	Hungary	Latvia	Lithuania	Slovenia	Slovakia
Population 2023* (million)	10.8	1.4	9.6	1.9	2.9	2.1	5.4
GDP per capita 2023* (USD)	30 475	30 998	21 076	24 929	28 482	32 350	24 471
Gross box office 2023 (M USD)	102.5	22.7	63.8	14.5	23.2	13.9	37.4
Admissions 2023 (million)	13.3	2.8	11.1	2.0	3.4	1.9	5.0
Average ticket price 2023 (USD)	7.7	8.1	5.7	7.1	6.7	7.4	7.5
Average admissions per capita 2023	1.2	2.1	1.2	1.1	1.2	0.9	0.9
Screens 2023*	882	92	420	80	110	106	295
National market shares 2023*	20.1%	21.8%	6.1%	8.2%	14.7%	10.7%	14.3%

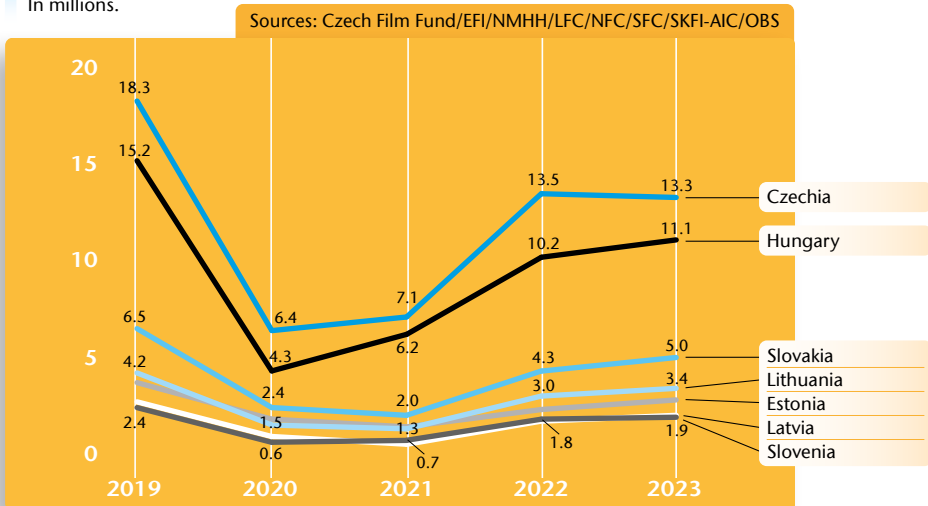
Number of feature films produced by selected Baltic and Central European countries | 2019-2023

In units. Including minority co-productions and feature documentaries.



Admissions in Baltic and selected Central European countries | 2019-2023

In millions.



Top 10 films by admissions in Czechia | 2023

	Original title	Country of origin	Director(s)	Distributor	Admissions
1	Barbie	US/GB	Greta Gerwig	Vertical Entertain.	722 410
2	Avatar: The Way of Water	US	James Cameron	Falcon	706 280
3	Onemanshow: The Movie	CZ	Andy Feh, Kamil Bartosek	Bontonfilm	545 617
4	Oppenheimer	US/GB	Christopher Nolan	CinemArt	542 323
5	Puss in Boots: The Last Wish	US	J. Crawford, J. Mercado	CinemArt	470 050
6	Guardians of the Galaxy Vol. 3	US	James Gunn	Falcon	459 744
7	The Super Mario Bros. Movie	US/JP	A. Horvath, M. Jelenic, ... ⁽¹⁾	CinemArt	390 461
8	PAW Patrol: The Mighty Movie	US/CA	Cal Brunker	CinemArt	341 891
9	Ostrov	CZ	Rudolf Havlik	CinemArt	332 589
10	Elemental	US	Trip Jennings	Falcon	318 838

(1) Pierre Leduc, Fabien Polack

Sources: Czech Film Fund/Unie Filmovych Distributoru

Top 10 films by admissions in Hungary | 2023

	Original title	Country of origin	Director(s)	Distributor	Admissions
1	Barbie	US/GB	Greta Gerwig	Intercomfilm	686 430
2	Oppenheimer	US/GB	Christopher Nolan	DunaFilm/UIP	570 036
3	Avatar: The Way of Water	US	James Cameron	Forum-Hungary	477 347
4	Guardians of the Galaxy Vol. 3	US	James Gunn	Forum-Hungary	318 888
5	The Super Mario Bros. Movie	US/JP	A. Horvath, M. Jelenic, ... ⁽¹⁾	DunaFilm/UIP	249 303
6	Indiana Jones and the Dial of Destiny	US	James Mangold	Forum-Hungary	226 796
7	Fast X	US	Louis Leterrier, Justin Lin	DunaFilm/UIP	224 722
8	Puss in Boots: The Last Wish	US	J. Crawford, J. Mercado	DunaFilm/UIP	212 582
9	Elemental	US	Peter Sohn	Forum-Hungary	209 910
10	John Wick: Chapter 4	US/DE	Chad Stahelski	Forum-Hungary	186 650

(1) Pierre Leduc, Fabien Polack

Source: National Film Office (NMHH)

Top 10 films by admissions in Slovakia | 2023

	Original title	Country of origin	Director(s)	Distributor	Admissions
1	Barbie	US/GB	Greta Gerwig	Continental Film	231 710
2	Oppenheimer	US/GB	Christopher Nolan	CinemArt	208 790
3	Invalid	SK/CZ	Jonás Karásek	CinemArt	208 164
4	Puss in Boots: The Last Wish	US	J. Crawford, J. Mercado	CinemArt	195 826
5	Avatar: The Way of Water	US	James Cameron	CinemArt	186 343
6	Elemental	US	Peter Sohn	CinemArt	156 349
7	The Super Mario Bros. Movie	US/JP	A. Horvath, M. Jelenic, ... ⁽¹⁾	CinemArt	148 114
8	Nikdy nehovor nikdy (Never Say...)	SK	Branislav Misík	Bontonfilm	147 328
9	PAW Patrol: The Mighty Movie	US/CA	Cal Brunker	CinemArt	137 165
10	Guardians of the Galaxy Vol. 3	US	James Gunn	CinemArt	129 349

(1) Pierre Leduc, Fabien Polack

Sources: Slovak Film Institute/UFD

Top 10 films by admissions in Lithuania | 2023

	Original title	Country of origin	Director(s)	Distributor	Admissions
1	Avatar: The Way of Water	US	James Cameron	Theatrical Film... ⁽¹⁾	192 417
2	Barbie	US/GB	Greta Gerwig	Acme/Warner Bros.	176 697
3	Oppenheimer	US/GB	Christopher Nolan	Dukine Film... ⁽²⁾	154 454
4	Puss in Boots: The Last Wish	US	J. Crawford, J. Mercado	Dukine Film... ⁽²⁾	135 716
5	Reemigrantai (Reemigrants)	LT	Kestutis Gudavicius	Stambus planas	109 290
6	The Super Mario Bros. Movie	US/JP	A. Horvath, M. Jelenic, ... ⁽³⁾	Dukine Film... ⁽²⁾	108 584
7	Elemental	US	Peter Sohn	Theatrical Film... ⁽¹⁾	102 722
8	Trolls Band Together	US	Tim Heitz Walt Dohrn	Dukine Film... ⁽²⁾	90 012
9	Mummies	ES inc/US	Juan Jesús García Galocha	Acme/Warner Bros.	64 796
10	Five Nights at Freddy's	US	Emma Tammi	Dukine Film... ⁽²⁾	62 974

(1) Distribution/WDSMPI (2) Distribution/Universal (3) Pierre Leduc, Fabien Polack Source: Lithuanian Film Centre (LFC)

South-Eastern Europe

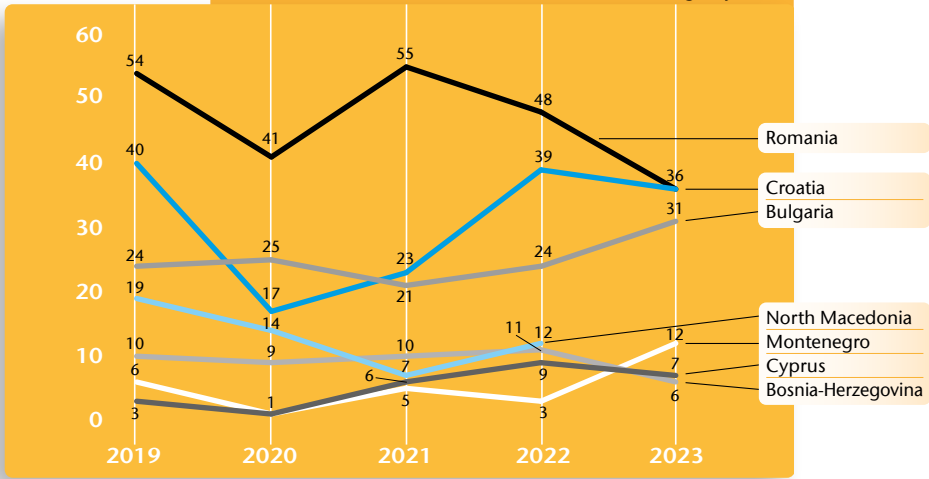
	BA ⁽¹⁾	BG ⁽²⁾	HR ⁽³⁾	CY ⁽⁴⁾	GE ⁽⁵⁾	ME ⁽⁶⁾	RO ⁽⁷⁾	UA ⁽⁸⁾
Population 2023 ^e (million)	3.5	6.4	3.9	0.9	3.7	0.6	19.1	33.2
GDP per capita 2023 ^e (USD)	7 778	16 087	20 876	34 791	8 165	11 339	18 413	5 225
Gross box office 2023 (M USD)	5.1	29.4	22.7	5.8	7.2	1.3	67.5	60.0
Admissions 2023 (million)	1.3	4.5	3.8	0.6	1.5	0.3	13.0	14.5
Average ticket price 2023 (USD)	3.8	6.6	5.9	9.6	4.7	4.7	5.2	4.1
Average admissions per capita 2023	0.4	0.7	1.0	0.7	0.4	0.5	0.7	0.4
Screens 2023 ^e	85	221	222	40	40 ⁽⁹⁾	12 ⁽⁹⁾	462	663 ⁽¹⁰⁾
National market shares 2023 ^e	2.0%	9.2%	7.3%	0.0%	3.7%	0.5%	18.0%	14.7%

(1) Bosnia-Herzegovina (2) Bulgaria (3) Croatia (4) Cyprus (5) Georgia (6) Montenegro (7) Romania (8) Ukraine (9) 2022 (10) 2021

Number of feature films produced by selected South-Eastern European countries | 2019-2023

In units. Including minority co-productions and feature documentaries.

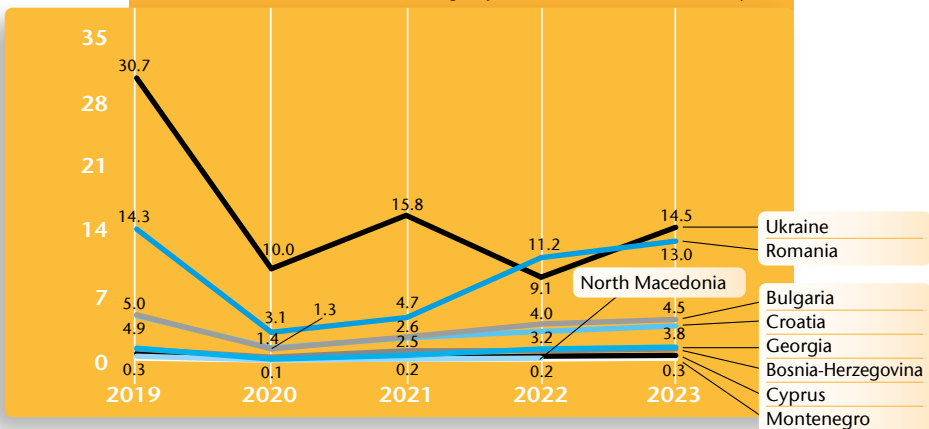
Sources: Sarajevo Film Festival/NFC/HAC/Dept. of Cultural Services, MOECSY/ME Min. Cult./North Macedonia Film Agency/CNC



Admissions in selected South-Eastern European countries | 2019-2023

In millions.

Sources: Sarajevo Film Festival/NFC/HAC/Dept. of Cultural Services, MOECSY/ME Min. Cult./North Macedonia Film Agency/CNC/UNIC/Media Business Reports



Top 10 films by admissions in Bulgaria | 2023

	Original title	Country of origin	Director(s)	Distributor	Admissions
1	Barbie	US/GB	Greta Gerwig	Aleksandra	212 758
2	Avatar: The Way of Water	US	James Cameron	Forum Film	204 671
3	Fast X	US	Louis Leterrier, Justin Lin	Forum Film	203 562
4	Oppenheimer	US/GB	Christopher Nolan	Forum Film	202 492
5	The Super Mario Bros. Movie	US/JP	A. Horvath, M. Jelenic, ... ⁽¹⁾	Forum Film	130 036
6	Chalga	BG	Marian Valev	Wolfsbane Films	112 782
7	Puss in Boots: The Last Wish	US	J. Crawford, J. Mercado	Forum Film	106 211
8	Indiana Jones and the Dial of Destiny	US	James Mangold	Forum Film	102 225
9	PAW Patrol: The Mighty Movie	US/CA	Cal Brunker	Forum Film	88 231
10	Meg 2: The Trench	US/CN	Ben Wheatley	Aleksandra	82 347

(1) Pierre Leduc, Fabien Polack

Source: Bulgarian National Film Center

Top 10 films by admissions in Croatia | 2023

	Original title	Country of origin	Director(s)	Distributor	Admissions
1	Barbie	US/GB	Greta Gerwig	Blitz Film	263 042
2	Oppenheimer	US/GB	Christopher Nolan	Editus	192 777
3	Avatar: The Way of Water	US	James Cameron	Blitz Film	141 812
4	The Super Mario Bros. Movie	US/JP	A. Horvath, M. Jelenic, ... ⁽¹⁾	Editus	118 388
5	The Diary of Paulina P.	HR	Neven Hitrec	Jucer	91 659
6	Cvrcak i mravica (Cricket & Antoinette)	HR	Rukavina, Milic, Krpan	Duplicato	80 765
7	Trolls Band Together	US	Tim Heitz, Walt Dohrn	Editus	74 420
8	Fast X	US	Louis Leterrier, Justin Lin	Editus	74 106
9	Elemental	US	Peter Sohn	Blitz Film	72 975
10	PAW Patrol: The Mighty Movie	US/CA	Cal Brunker	Blitz Film	71 635

(1) Pierre Leduc, Fabien Polack

Source: HAVCR (Croatian Audiovisual Centre)

Top 10 films by admissions in Bosnia-Herzegovina | 2023

	Original title	Country of origin	Director(s)	Distributor	Admissions
1	Barbie	US/GB	Greta Gerwig	Blitz Film	84 386
2	Oppenheimer	US/GB	Christopher Nolan	Una Film	48 042
3	Avatar: The Way of Water	US	James Cameron	Blitz Film	40 649
4	The Super Mario Bros. Movie	US/JP	A. Horvath, M. Jelenic, ... ⁽¹⁾	Una Film	36 395
5	Fast X	US	Louis Leterrier, Justin Lin	Una Film	33 987
6	Meg 2: The Trench	US/CN	Ben Wheatley	Blitz Film	29 993
7	PAW Patrol: The Mighty Movie	US/CA	Cal Brunker	Una Film	25 004
8	The Nun II	US	Michael Chaves	Blitz Film	24 793
9	Elemental	US	Peter Sohn	Blitz Film	23 331
10	John Wick: Chapter 4	US/DE	Chad Stahelski	Blitz Film	22 610

(1) Pierre Leduc, Fabien Polack

Source: Sarajevo Film Festival

Top 10 films by admissions in Cyprus | 2023

	Original title	Country of origin	Director(s)	Distributor	Admissions
1	Barbie	US/GB	Greta Gerwig	FSF	68 384
2	Camping - The Final Battle	CY	Zikopoulos Nikolas	+Indep. Studios	33 766
3	Oppenheimer	US/GB	Christopher Nolan	FSF	30 716
4	The Super Mario Bros. Movie	US/JP	A. Horvath, M. Jelenic, ... ⁽¹⁾	FSF	29 300
5	Avatar: The Way of Water	US	James Cameron	Feelgood	27 374
6	Fast X	US	Louis Leterrier, Justin Lin	FSF	22 869
7	Puss in Boots: The Last Wish	US	J. Crawford, J. Mercado	FSF	18 599
8	Spider-Man: Across the Spider-Verse	US	J. Dos Santos, K. Powers, ... ⁽²⁾	Feelgood	18 070
9	The Little Mermaid	US	Rob Marshall	Feelgood	17 007
10	The Nun II	US	Michael Chaves	FSF	13 383

(1) Pierre Leduc, Fabien Polack

(2) Justin K. Thompson

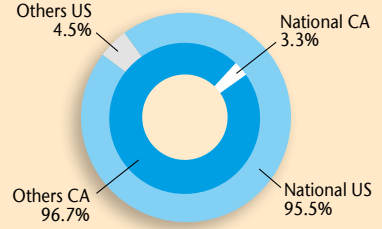
Sources: Department of Cultural Services - Deputy Ministry of Culture

North America

	North America	US	Canada
Population 2023 ^e (million)	374.9	335.1	39.8
GDP per capita 2023 ^e (USD)	77 530.6	80 412	53 247
Gross box office 2023 ^e (bn USD)	8.63	7.97	0.66
Admissions 2023 ^e (1) (million)	831.2	756.7	74.6
Average ticket price 2023 ^e (USD)		10.5	9.2 (2)
Average admissions per capita 2023 ^e		2.3	1.9
Screens 2023 ^e	41 077	38 400	2 677 (2)

(1) Estimated admissions based on average ticket prices. (2) 2022 (3) By GBO.

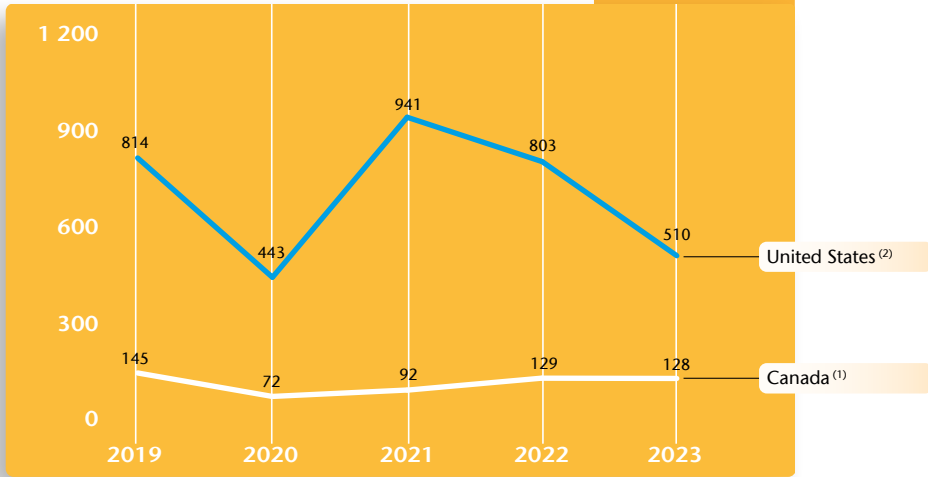
Market shares 2023^{(3) e}



Number of US & Canadian feature films produced | 2019-2023

In units.

Sources : MPA, CMPA

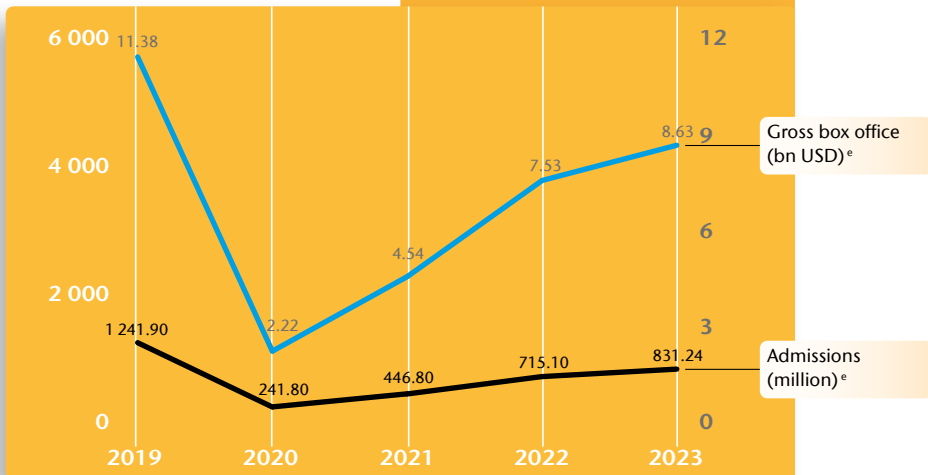


(1) Films released.

(2) Number of feature films entering production. Includes films that were made for or by an online video service; does not include student films, documentaries, films created for straight-to-DVD or Blu-ray release.

Admissions and gross box office in US & Canada | 2019-2023

Sources: MPA, NATO, CMPA, OBS, Comscore



Top 20 films by admissions in North America | 2023^e

Admissions estimated based on the average ticket price of USD 10.53 as communicated by Comscore.

Original title	Country of origin	Director(s)	Distributor	Admissions ^e
1 Barbie	US/GB	Greta Gerwig	Warner Bros.	60 420 321
2 The Super Mario Bros. Movie	US/JP	A. Horvath, M. Jelenic, ... ⁽¹⁾	Universal	54 599 651
3 Spider-Man: Across The Spider-Verse	US	J. Dos Santos, K. Powers, ... ⁽²⁾	Sony	36 211 901
4 Guardians of the Galaxy Vol. 3	US	James Gunn	Disney	34 092 670
5 Oppenheimer	US/GB	Christopher Nolan	Universal	30 968 791
6 Avatar: The Way of Water	US	James Cameron	Disney	30 955 162
7 The Little Mermaid	US	Rob Marshall	Disney	28 316 435
8 Ant-Man and the Wasp: ...	US	Peyton Reed	Disney	20 370 837
9 John Wick: Chapter 4	US/DE	Chad Stahelski	Lionsgate	17 771 302
10 Sound of Freedom	US/MX	Alejandro Monteverde	Angel Studios	17 490 793
11 Taylor Swift: The Eras Tour	US	Sam Wrench	Variance Films	17 147 273
12 Indiana Jones and the Dial of...	US	James Mangold	Disney	16 569 845
13 Mission: Impossible - Dead...	US	Christopher McQuarrie	Paramount	16 395 155
14 The Hunger Games: The Ballad of...	US/CA	Francis Lawrence	Lionsgate	15 168 056
15 Transformers: Rise of the Beasts	US	Steven Caple Jr.	Paramount	14 942 236
16 Creed III	US	Michael B. Jordan	MGM	14 838 425
17 Elemental	US	Peter Sohn	Disney	14 665 403
18 Fast X	US	Louis Leterrier, Justin Lin	Universal	13 877 114
19 Puss In Boots: The Last Wish	US	J. Crawford, J. Mercado	Universal	13 455 195
20 Five Nights at Freddy's	US	Emma Tammi	Universal	13 036 621

(1) Pierre Leduc, Fabien Polack (2) Justin K. Thompson

Sources: LUMIERE/OBS, Comscore

Distribution and exhibition

2023 was a bumpy ride for the North American film industry. While two historical strikes by the WGA and SAG-AFTRA essentially froze the production and promotion of Hollywood films for months, blockbuster hits helped total box office revenues to reach 8.6 billion, representing a 14.6% year-on-year increase (down 24.2% compared to 2019).

The positive results were largely attributed to the emergence of several unexpected box office successes, in a time when action-packed superhero movies and established franchises achieved results below expectations. *Barbie*, the all-time highest grossing film directed by a woman, led the box office with USD 632.2 million, followed by two animation films: *The Super Mario Bros. Movie* (USD 574.9 m), the highest-grossing film ever based on a video game, and *Spider-Man: Across the Spider-Verse* (USD 381.3 m). The success of the rated-R biopic *Oppenheimer*, the concert event film *Taylor Swift: The Eras Tour*, and the Christian thriller film *The Sound of Freedom* additionally suggest a shift in audience preferences towards fresh and original cinematic projects.

Production and funding

The strikes in 2023 by the WGA and SAG-AFTRA had a significant impact on the American and global entertainment industry. Production

halts resulted in delayed releases, financial losses, and widespread uncertainty until agreements were reached with both unions in autumn. The number of US feature films produced dropped to 510 titles (-36.5%), marking the beginning of what industry experts predict will be a period of slowdown for American film and television productions compared to pre-pandemic levels, due to rising costs. Beyond the economic implications, the resolutions reached in 2023 aim to provide better working conditions for thousands of film professionals who deemed the previous state of the industry unsustainable. Among others, resolutions include wage increases, revised residual payments, and regulations concerning the use of artificial intelligence.

As Hollywood producers are expected to progressively shift film productions overseas to capitalize on tax incentives and mitigate expenses, American states, such as Michigan and Wisconsin most recently, are equally trying to lure Hollywood productions with increasingly appealing revised production incentives. Film incentives granted to productions in the United States have topped USD 25 billion over the last 20 years, but the debate intensifies over whether these schemes truly deliver a significant economic benefit to states.

Sources: MPA, Comscore, NATO, *Variety*, *Screen International*, *The Hollywood Reporter*, *The New York Times*, *Reuters*

Latin America

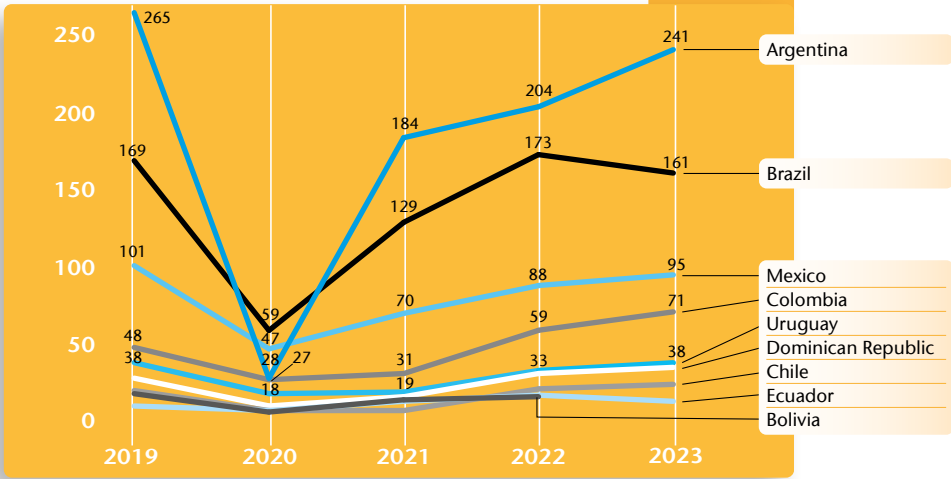
	Argentina	Bolivia	Brazil	Chile	Colombia
Population 2023 (million)	46.8	12.1	204.2	20.0	52.2
GDP per capita 2023 (M USD)	13 297	3 858	10 413	17 254	6 976
Gross box office 2023 (M USD)	168.4	32.4	447.9	127.3	151.4
Admissions 2023 (million)	40.6	5.1	114.1	25.1	54.1
Average ticket price 2023 (USD)	4.1	6.3	3.9	5.1	2.8
Average admissions per capita 2023	0.9	0.4	0.6	1.3	1.0
Screens 2023	954	130 ⁽¹⁾	3 468	502	1 260
National market shares 2023	7.6%	2.4%	3.2%	3.1%	1.2%

(1) 2022 (2) January-October 2023

Number of national feature films released in Latin America | 2019-2023

In units.

Sources: OIA^(*)

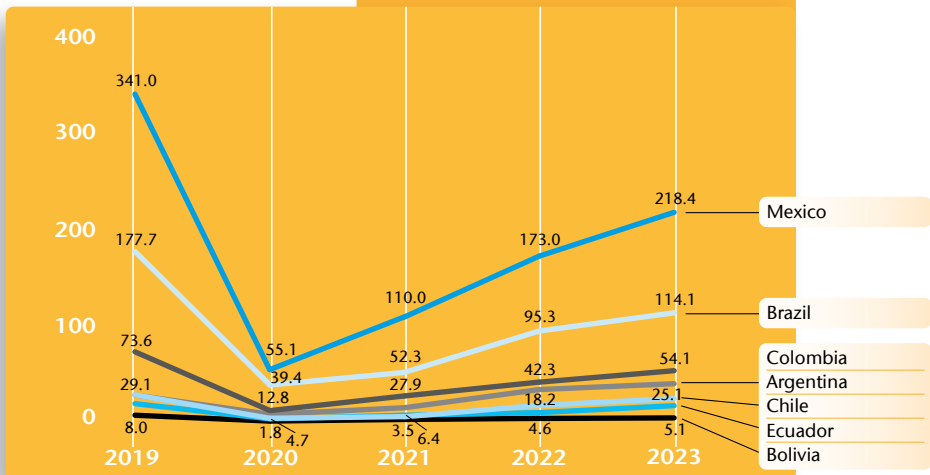


(*) Observatório Iberoamericano Audiovisual (OIA) grouping INCAA (AR), ADECINE (BO), ANCINE (BR), CNCA (CL), SIREC DACMI (CO), DGCINE (DO), Banco Central del Ecuador (EC), IMCINE (MX), ACAU (UY).

Admissions in Latin America | 2019-2023

In millions.

Sources: Observatorio Iberoamericano Audiovisual



	Dominican Republic	Ecuador	Mexico	Uruguay
Population 2023 (million)	10.7	18.3	131.2	3.6
GDP per capita 2023 (M USD)	11 249	6 500	13 804	21 378
Gross box office 2023 (M USD)	20.9	89.4	832.0	14.3 ⁽²⁾
Admissions 2023 (million)	4.0	17.8	218.4	2.1 ⁽²⁾
Average ticket price 2023 (USD)	5.2	5.0	3.8	6.7
Average admissions per capita 2023	0.4	1.0	1.7	0.6
Screens 2023	193	373	7 389	98
National market shares 2023	11.0%	1.0%	4.0%	1.9%

Mexico

In Latin America's largest market, attendance surged by 26.2% to reach 218 million tickets sold in 2023, equivalent to 64% of 2019's figures. Box office revenues followed suit, rising by a comparable rate to MPX 14.8 billion (USD 832 million), down 21% from 2019. Hollywood maintained dominance, monopolizing the top 10 year-end spots with animated hit *The Super Mario Bros. Movie* leading the pack with 22.7 million admissions, followed by *Barbie's* 13.0 million admissions.

The market share of local productions saw a slight uptick to 4.0% of total tickets sold, marking their strongest showing in four years and nearly doubling admissions compared to 2022. Among the 22 national releases that crossed the MXP 1 million revenue mark, the standout was *Radical*, a drama based on real events, amassing over 3.2 million admissions and MXP 208.2 million (USD 11.7 million) in revenue.

In 2023, a record 70 Mexican titles were shown internationally, the highest in a decade. Notably, horror flick *Huesera* was screened in 17 countries following its 2022 Tribeca premiere.

Brazil

Cinema attendance in Brazil grew by 19.7% in 2023, reaching 114 million tickets sold and securing its position as the second-largest market for attendance in the region, trailing only Mexico. Total box office revenues reached BRL 2.2 billion (USD 448 million). However, akin to Mexico, Brazil faces a more challenging recovery compared to other Latin American countries, with attendance levels still down 35.8% compared to 2019.

Following a trend observed across the region, the year-end top 10 was exclusively dominated by American releases. *Barbie* led the box office with 10.7 million admissions,

followed by *The Super Mario Bros. Movie* (6.6 million admissions) and *Fast X* (6.5 million admissions). Local titles achieved a market share of 3.2% in 2023 marking the second-lowest figure in the past decade, after 2020. Among Brazilian productions, *Nosso Sonho* emerged as the most-watched local film of 2023, attracting 0.5 million admissions. Following closely behind was *Minha irmã e Eu*, which garnered over 468 000 admissions within just one week of its late December release, showcasing promising potential.

To bolster the audiovisual industry, the Brazilian government initiated a series of recovery initiatives aimed at supporting the sector. In 2023 alone, a substantial sum of USD 972 million was allocated to this purpose.

Colombia

In 2023, there was a notable 27.8% upsurge in cinema admissions in Colombia, reaching 54.1 million tickets sold, while box office receipts soared to COP 655 billion (USD 151 million). The cinematic landscape was predominantly shaped by American releases, which secured a commanding 93% market share and monopolized the top 10 ranking. Leading the pack were hits like *The Super Mario Bros. Movie* (5.3 million admissions), *Barbie* (3.3 million admissions), and *Fast X* (2.9 million admissions). Despite an unprecedented number of local productions hitting theatres (72 Colombian features in total, encompassing 43 fiction films, 28 documentaries, and 1 animation), local titles struggled to make a significant impact. Colombian films accounted for a mere 0.64 million admissions, representing a 1.2% market share, the lowest on record. This surge in local releases coincided with an all-time high level of public funding allocated to film development initiatives.

Sources: Observatório Iberoamericano Audiovisual (OIA)

Top 10 films by admissions in Argentina | 2023

Original title	Country of origin	Director(s)	Admissions
1 Barbie	US/GB	Greta Gerwig	3 505 267
2 The Super Mario Bros. Movie	US/JP	A. Horvath, M. Jelenic, P. Leduc, F. Polack	2 975 176
3 Elemental	US	Peter Sohn	2 591 462
4 Puss in Boots: The Last Wish	US	Joel Crawford, Januel Mercado	2 483 230
5 Fast X	US	Louis Leterrier, Justin Lin	2 310 966
6 Avatar: The Way of Water	US	James Cameron	1 862 468
7 Guardians of the Galaxy Vol. 3	US	James Gunn	1 407 559
8 The Little Mermaid	US	Rob Marshall	1 357 129
9 The Nun II	US	Michael Chaves	1 274 277
10 Five Nights at Freddy's	US	Emma Tammi	1 174 799

Sources: OBS/LUMIERE, Comscore

Top 10 films by admissions in Brazil | 2023

Original title	Country of origin	Director(s)	Admissions
1 Barbie	US/GB	Greta Gerwig	10 678 066
2 The Super Mario Bros. Movie	US/JP	A. Horvath, M. Jelenic, P. Leduc, F. Polack	6 564 765
3 Fast X	US	Louis Leterrier, Justin Lin	6 461 862
4 Puss in Boots: The Last Wish	US	Joel Crawford, Januel Mercado	5 229 276
5 Avatar: The Way of Water	US	James Cameron	4 853 296
6 Guardians of the Galaxy Vol. 3	US	James Gunn	4 354 951
7 The Little Mermaid	US	Rob Marshall	4 122 193
8 Elemental	US	Peter Sohn	4 109 647
9 Spider-Man: Across the Spider-Verse	US	J. Dos Santos, K. Powers, J. K. Thompson	3 000 973
10 Oppenheimer	US/GB	Christopher Nolan	2 937 482

Sources: OIA, ANCINE

Top 10 films by admissions in Chile | 2023

Original title	Country of origin	Director(s)	Admissions
1 The Super Mario Bros. Movie	US/JP	A. Horvath, M. Jelenic, P. Leduc, F. Polack	2 571 908
2 Barbie	US/GB	Greta Gerwig	1 766 399
3 Puss in Boots: The Last Wish	US	Joel Crawford, Januel Mercado	1 325 128
4 Avatar: The Way of Water	US	James Cameron	1 181 927
5 Elemental	US	Peter Sohn	1 158 257
6 Guardians of the Galaxy Vol. 3	US	James Gunn	1 005 353
7 Fast X	US	Louis Leterrier, Justin Lin	989 262
8 Spider-Man: Across the Spider-Verse	US	J. Dos Santos, K. Powers, J. K. Thompson	959 733
9 Oppenheimer	US/GB	Christopher Nolan	879 323
10 The Nun II	US	Michael Chaves	821 950

Sources: OBS/LUMIERE, Comscore

Top 10 films by admissions in Colombia | 2023

Original title	Country of origin	Director(s)	Admissions
1 The Super Mario Bros. Movie	US/JP	A. Horvath, M. Jelenic, P. Leduc, F. Polack	5 336 964
2 Barbie	US/GB	Greta Gerwig	3 349 192
3 Fast X	US	Louis Leterrier, Justin Lin	2 883 831
4 Avatar: The Way of Water	US	James Cameron	2 737 251
5 Puss in Boots: The Last Wish	US	Joel Crawford, Januel Mercado	2 202 389
6 Elemental	US	Peter Sohn	1 901 609
7 Guardians of the Galaxy Vol. 3	US	James Gunn	1 727 328
8 Sound of Freedom	US/MX	Alejandro Monteverde	1 621 809
9 John Wick: Chapter 4	US/DE	Chad Stahelski	1 414 820
10 Meg 2: The Trench	US/CN	Ben Wheatley	1 356 400

Sources: OIA, SIREC DACMI

Top 10 films by admissions in the Dominican Republic | 2023 ⁽¹⁾

	Original title	Country of origin	Director(s)	Admissions
1	The Super Mario Bros. Movie	US/JP	Aaron Horvath, Michael Jelenic	408 380
2	Five Nights at Freddy's	US	Emma Tammi	348 834
3	Barbie	US/GB	Greta Gerwig	254 037
4	Fast X	US	Louis Leterrier, Justin Lin	233 310
5	John Wick: Chapter 4	US/DE	Chad Stahelski	164 343
6	Elemental	US	Peter Sohn	124 687
7	Sound of Freedom	US/MX	Alejandro Monteverde	108 561
8	Ant-Man and the Wasp: Quantumania	US	Peyton Reed	95 024
9	Malos Padres	DO	Jose Ramon Alama	87 034
10	Transformers: Rise of the Beasts	US	Steven Caple Jr.	86 429

(1) 2023 releases only.

Sources: OIA, DGCINE

Top 10 films by admissions in Ecuador | 2023 ⁽¹⁾

	Original title	Country of origin	Director(s)	Admissions
1	The Super Mario Bros. Movie	US/JP	Aaron Horvath, Michael Jelenic	1 608 005
2	Barbie	US/GB	Greta Gerwig	858 188
3	Fast X	US	Louis Leterrier, Justin Lin	751 165
4	Guardians of the Galaxy Vol. 3	US	James Gunn	591 066
5	Ant-Man and the Wasp: Quantumania	US	Peyton Reed	444 860
6	Sound of Freedom	US/MX	Alejandro Monteverde	415 949
7	Spider-Man: Across the Spider-Verse	US	J. Dos Santos, K. Powers, J. K. Thompson	411 950
8	Elemental	US	Peter Sohn	394 989
9	The Nun II	US	Michael Chaves	372 721
10	Five Nights at Freddy's	US	Emma Tammi	307 481

(1) 2023 releases only.

Sources: OIA, Banco Central del Ecuador

Top 10 films by admissions in Mexico | 2023

	Original title	Country of origin	Director(s)	Admissions
1	The Super Mario Bros. Movie	US/JP	Aaron Horvath, Michael Jelenic	22 745 065
2	Barbie	US/GB	Greta Gerwig	12 972 353
3	Fast X	US	Louis Leterrier, Justin Lin	9 764 104
4	Guardians of the Galaxy Vol. 3	US	James Gunn	9 353 685
5	Spider-Man: Across the Spider-Verse	US	J. Dos Santos, K. Powers, J. K. Thompson	7 392 333
6	Five Nights at Freddy's	US	Emma Tammi	6 452 809
7	The Nun II	US	Michael Chaves	5 892 048
8	Wonka	US/GB	Paul King	5 724 355
9	Meg 2: The Trench	US/CN	Ben Wheatley	5 613 670
10	Elemental	US	Peter Sohn	5 591 168

Sources: OIA, IMCINE

Top 10 films by admissions in Uruguay | 2023

	Original title	Country of origin	Director(s)	Admissions
1	Barbie	US/GB	Greta Gerwig	180 241
2	The Super Mario Bros. Movie	US/JP	Aaron Horvath, Michael Jelenic	162 942
3	Elemental	US	Peter Sohn	143 915
4	Fast X	US	Louis Leterrier, Justin Lin	127 226
5	Puss in Boots: The Last Wish	US	Joel Crawford, Januel Mercado	95 212
6	Avatar: The Way of Water	US	James Cameron	90 952
7	Oppenheimer	US/GB	Christopher Nolan	83 792
8	Sound of Freedom	US/MX	Alejandro Monteverde	65 381
9	The Little Mermaid	US	Rob Marshall	53 077
10	Guardians of the Galaxy Vol. 3	US	James Gunn	52 938

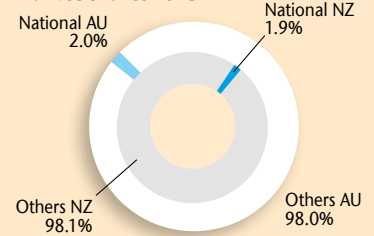
Sources: OIA, ACAU

Australia and New Zealand

	Australia	New Zealand
Population 2023* (million)	26.6	5.2
GDP per capita 2023* (USD)	63 487	48 072
Gross box office 2023 (M USD)	654.5	107.8
Admissions 2023* (million)	58.1	10.9
Average ticket price 2023 (USD)	11.3	9.9
Average admissions per capita 2023	2.2	2.1
Screens 2023	2 272	505 ⁽²⁾

(1) By GBO. (2) 2022

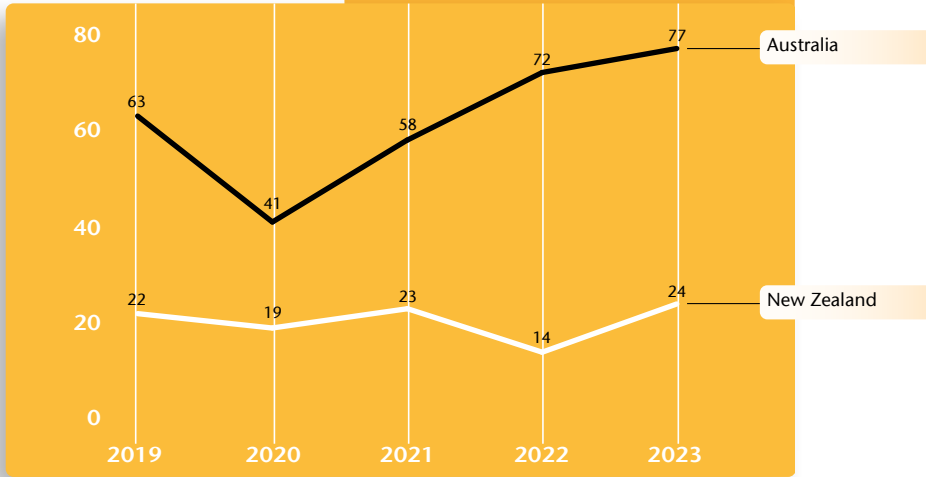
Market shares 2023^{(1) e}



Number of Australian and New Zealand feature films released | 2019-2023⁽¹⁾

In units.

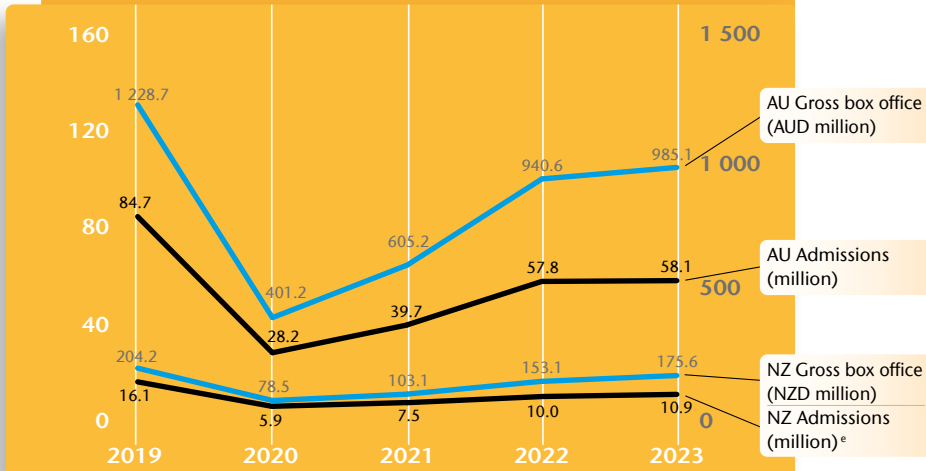
Sources: Screen Australia, LUMIERE/OBS, Comscore



(1) Includes fiction and documentary feature films with a theatrical release.

Admissions and gross box office in Australia and New Zealand | 2019-2023

Sources: MPDAA, Screen Australia, MPDA, NZ Film Commission, LUMIERE/OBS, Comscore



Top 10 films by admissions in Australia | 2023

Original title	Country of origin	Director(s)	Distributor	Admissions
1 Barbie	US/GB	Greta Gerwig	Warner Bros.	4 768 310
2 The Super Mario Bros. Movie	US/JP	Aaron Horvath, Michael Jelenic	Universal	3 226 525
3 Avatar: The Way of Water	US	James Cameron	Disney	2 161 013
4 Oppenheimer	US/GB	Christopher Nolan	Universal	2 026 548
5 Spider-Man: Across the Spider-Verse	US	J. Dos Santos, K. Powers, ... ⁽¹⁾	Sony	2 019 150
6 Guardians of the Galaxy Vol. 3	US	James Gunn	Disney	1 758 779
7 The Little Mermaid	US/DE	Rob Marshall	Disney	1 454 386
8 John Wick: Chapter 4	US/US	Chad Stahelski	Studiocanal	1 301 695
9 Wonka	US/GB	Paul King	Warner Bros.	1 187 289
10 Mission: Impossible - Dead...	US	Christopher McQuarrie	Paramount	1 138 998

(1) Pierre Leduc, Fabien Polack

Source: MPDAA

Top 10 films by admissions in New Zealand | 2023

Estimated admissions based on average ticket price of NZD 15.89

Original title	Country of origin	Director(s)	Distributor	Admissions ^o
1 Barbie	US/GB	Greta Gerwig	Warner Bros.	911 008
2 Avatar: The Way of Water	US	James Cameron	Disney	504 107
3 Oppenheimer	US/GB	Christopher Nolan	Universal	439 959
4 The Super Mario Bros. Movie	US/JP	A. Horvath, M. Jelenic, ... ⁽¹⁾	Universal	439 554
5 Guardians of the Galaxy Vol. 3	US	James Gunn	Disney	395 359
6 Spider-Man: Across the Spider-Verse	US	J. Dos Santos, K. Powers, ... ⁽²⁾	Sony	363 380
7 Mission: Impossible - Dead...	US	Christopher McQuarrie	Paramount	273 186
8 Fast X	US	Louis Leterrier, Justin Lin	Universal	250 280
9 John Wick: Chapter 4	US/DE	Chad Stahelski	Studiocanal	237 411
10 The Hunger Games: The Ballad of...	US/CA	Francis Lawrence	Roadshow	230 627

(1) Pierre Leduc, Fabien Polack

(2) Justin K. Thompson

Sources: MPDA, OBS/LUMIERE, Comscore

Distribution and exhibition

In 2023, Australian box office revenues increased by 4.7% to AUD 985 million (USD 655 million). Estimates suggest over 58 million tickets were sold, marking a 31.5% decrease from 2019. Australian industry experts mention the schedule disruptions caused by the American strikes as an important reason for the limited growth, supported by the fact that Hollywood films held a market share of 74.1% over the past three years and, in 2023, occupied the entirety of the year-end top 10. *Barbie* (4.8 million admissions) led the box office, followed by *The Super Mario Bros. Movie* (3.2 million admissions), and *Avatar: The Way of Water* (2.1 million admissions) in 2023 alone, after its December 2022 release).

A record number of 77 Australian feature productions were released theatrically in 2023 (42 fiction films and 35 documentaries), achieving a 2.0% market share, the lowest in seven years. The most successful local title was *John Farnham: Finding the Voice*, a feature documentary on the titular Australian singer, grossing AUD 4.5 million (USD 3.0 million) and ranking 50th in the yearly box office chart.

Cinema attendance in New Zealand increased by 9.3%, reaching 10.9 million tickets sold (-32.2% compared to 2019). The 24 national feature films released achieved a market share of 1.9%.

Production and funding

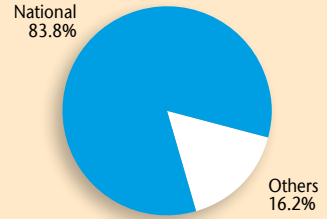
Screen Australia reports that foreign productions represented 52% of the AUD 2.34 billion (USD 1.55 billion) total production expenditure for the 2022/23 financial year. This spend, the second highest on record after 2021/22, saw a decline in Australian film and TV project spending (-26%), contrasting with significant growth in production spending from 96 foreign titles (+35%). Despite being a popular destination for international productions due to attractive incentive schemes, New South Wales announced a cut of AUS 118 million (USD 79 million) to film funds and programmes in 2023, sparking concerns over potential job losses and diminishing Sydney's stature as a national and international film hub. On a positive note, a newly ratified co-production treaty between Australia and India is anticipated to bolster collaboration, expanding financing opportunities and facilitating the exchange of resources and talent between the two nations' industries.

Sources: Screen Australia, MPDAA, Comscore, Screen, Variety

People's Republic of China

Population 2023 ^e	1 411.4 million
GDP per capita 2023 ^e	12 541 USD
Gross box office 2023	54.92 bn CNY (7.75 bn USD)
Admissions 2023	1 299.0 million
Average ticket price 2023	42.3 CNY (6.0 USD)
Average admissions per capita 2023 ^e	0.9
Screens 2022 2023	83 998 86 310

Market shares 2023⁽¹⁾

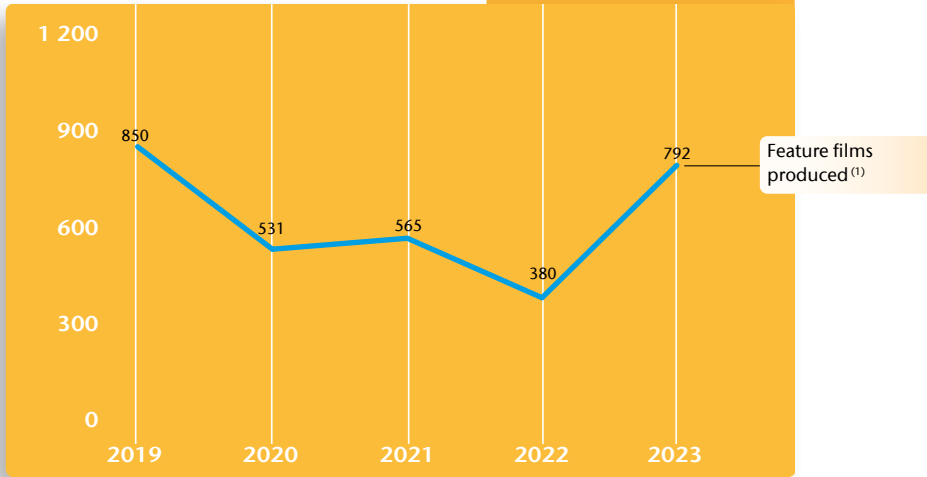


(1) By GBO.

Number of feature films produced in China | 2019-2023^e

In units.

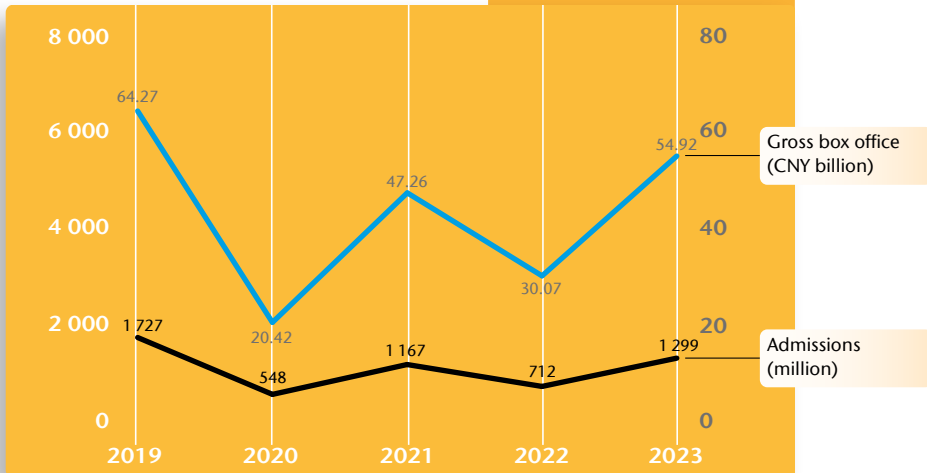
Source: China Film Administration



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

Admissions and gross box office in China | 2019-2023

Source: China Film Administration



Top 20 films by admissions in China | 2023

English Title	Country of origin	Director(s)	Admissions
1 No More Bets	CN	Shen Ao	92 476 577
2 Full River Red	CN	Zhang Yimou	91 218 941
3 Lost in the Stars	CN	Rui Cui, Xiang Liu	84 502 450
4 The Wandering Earth 2	CN	Frant Gwo	78 793 827
5 Creation of the Gods I: Kingdom of Storms	CN	Wuershan	60 476 613
6 Never Say Never	CN	Wang Bao Qiang	54 028 820
7 Chang An	CN	Junwei Xie, Jing Zou	44 006 608
8 Boonie Bears: Guardian Code	CN	Yongchang Lin, Heqi Shao	32 116 246
9 Under the Light	CN	Zhang Yimou	31 307 044
10 Godspeed	CN	Yi Xiaoxing	28 449 161
11 Fast X	US	Louis Leterrier, Justin Lin	26 079 113
12 Suzume	JP	Makoto Shinkai	24 204 590
13 The Ex-Files 4: Marriage Plan	CN	Tian Yusheng	23 747 207
14 One and Only	CN	Dong Chengpeng	21 996 809
15 Born to Fly	CN	Liu Xiaoshi	20 252 228
16 The Volunteers: To the War	CN	Chen Kaige	20 216 528
17 Meg 2: The Trench	US/CN	Ben Wheatley	20 061 950
18 Deep Sea	CN	Tian Xiao Peng	19 662 032
19 The First Slam Dunk	JP	Takehiko Inoue	18 117 248
20 Hidden Blade	CN	Er Cheng	17 601 597

Sources: LUMIERE/OBS, Comscore

Distribution and exhibition

After fluctuating considerably over several years, the Chinese film industry made a notable resurgence in 2023. Witnessing an impressive 82.6% year-on-year increase, annual box office sales reached a substantial CNY 54.9 billion (USD 7.8 billion), accompanied by the sale of nearly 1.3 billion tickets throughout the year. Although box office figures are still down -14.6% compared to 2019, the China Film Administration stated that 2023 represented the fourth highest box office year on record. The successful year was partly attributed to the expansion of cinema operations into smaller towns and rural areas (the number of screens increased by 23.7% compared to 2019), and the increase of engagement of young female adults as cinema goers.

These figures were led by the success of local titles, which occupied the entirety of the yearly top 10. The only other time this occurred in recent years was during the less prosperous box office year of 2020. The thriller *No More Bets* and the period piece *Full River Red* were the most watched titles, both with more than 90 million admissions. They were followed by the mystery crime *Lost in the Stars*, the sci-fi sequel *The Wandering Earth 2*, and *Creation of the Gods I: Kingdom of Storms*, the first chapter of a planned epic fantasy trilogy.

Amid tensions between Beijing and Washington, no Hollywood film managed to earn a spot in the Top 10 in 2023, with highly anticipated titles (such as *Aquaman and the Lost Kingdom*, *Fast X*, and the latest *Mission: Impossible instalment*) falling short of expectations. Once attractive releases for Chinese cinemagoers, Hollywood blockbusters are rapidly being replaced at the top of the charts with equally spectacular local big budget titles, which seem to better suit local audiences' tastes.

Production and funding

A total of 792 feature films were produced in China in 2023, 412 more than 2022. The ongoing progress of the market is a result of collaborative efforts among all industry participants, aimed at fostering a sustainable development for the industry, under the attentive eye of the government. Initiatives such as public welfare screenings and continuous subsidies from specialized funds have effectively cultivated a culture of cinema going among audiences and helped productions reach top-tier quality in moviemaking. The China Film Administration aims to enhance international communication to further promote Chinese titles across the globe and expand their currently under-exploited reach.

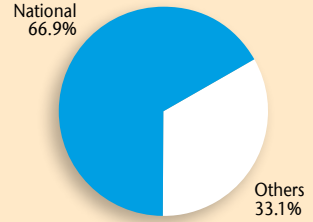
Sources: China Film Administration, *Variety*, *The Hollywood Reporter*, *The New York Times*, Maoyan Research Institute

Japan

Population 2023*	124.6 million
GDP per capita 2023*	33 950 USD
Gross box office 2023	221.48 bn JPY (1.58 bn USD)
Admissions 2023	155.5 million
Average ticket price 2023	1 424 JPY (10.1 USD)
Average admissions per capita 2023	1.2
Screens 2022 2023	3 634 3 653

(1) By GBO

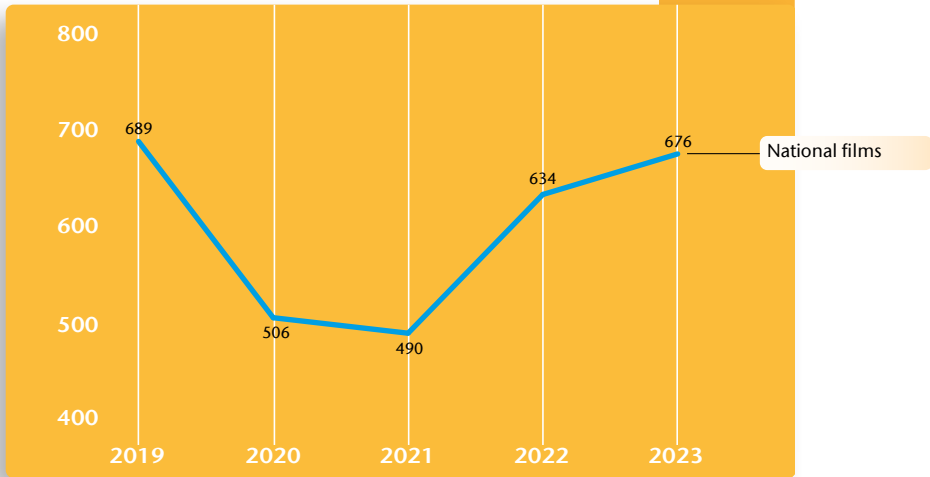
Market shares 2023⁽¹⁾



Number of Japanese feature films released | 2019-2023

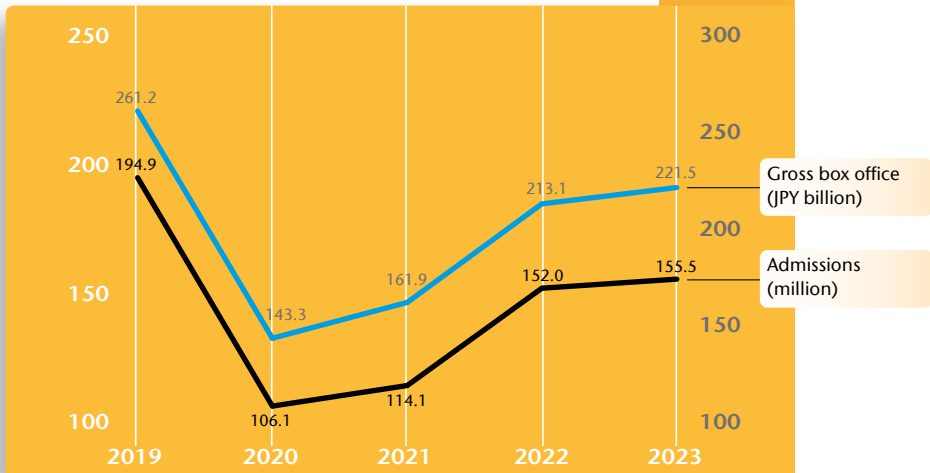
In units.

Source: EIREN



Admissions and gross box office in Japan | 2019-2023

Source: EIREN



Top 20 films by admissions in Japan | 2023

English Title	Country of origin	Director(s)	Distributor	Admissions*
1 The Super Mario Bros. Movie	US/JP	A. Horvath, M. Jelenic, ... ⁽¹⁾	Toho/Towa	9 820 884
2 Detective Conan: Black Iron Submarine	JP	Yuzuru Tachikawa	Toho	9 779 584
3 The First Slam Dunk	JP	Takehiko Inoue	Toei	6 048 053
4 The Boy and the Heron	JP	Hayao Miyazaki	Toho	5 826 474
5 Kingdom: Flame of Destiny	JP	Shinsuke Sato	Toho/Towa	3 890 905
6 Doraemon the Movie: Nobita's Sky...	JP	Takumi Doyama	Toho	3 614 441
7 Mission: Impossible - Dead Reckoning...	US	Christopher McQuarrie	Towa	3 556 021
8 Don't Call it Mystery: The Movie	JP	Hiroaki Matsuyama	Toho	3 514 477
9 Tokyo MER: Mobile Emergency Room...	JP	Aya Matsuki	Toho	3 409 381
10 Godzilla Minus One	JP	Takashi Yamazaki	Toho	3 071 205
11 Demon Slayer: Kimetsu No Yaiba - To...	JP	Haruo Sotozaki	Toho	2 919 369
12 Fast X	US	Louis Leterrier, Justin Lin	Toho/Towa	2 529 038
13 Suzume	JP	Makoto Shinkai	Toho	2 465 403
14 The Little Mermaid	US	Rob Marshall	Disney	2 326 640
15 Elemental	US	Peter Sohn	Disney	2 092 133
16 As Long as We Both Shall Live	JP	Ayuko Tsukahara	Toho	2 089 016
17 Shin Jigen! Crayon Shin-chan the Movie	JP	Hitoshi Ône	Toho	2 001 824
18 Tokyo Revengers 2: Part 1	JP	Tsutomu Hanabusa	Warner Bros.	1 999 891
19 The Legend & Butterfly	JP	Keishi Ohtomo	TOEI	1 878 089
20 Indiana Jones and the Dial of Destiny	US	James Mangold	Disney	1 800 832

(1) Pierre Leduc, Fabien Polack

Source: OBS/LUMIERE, Comscore

Distribution and exhibition

Cinema attendance in Japan stagnated in 2023, with only a shy increase in admissions of 2.3% to a total of 155.5 million tickets sold. The figure remains far from the record high of 194.9 million tickets sold in 2019 (-20.2%). Higher ticket prices helped box office numbers reach slightly better results: JPY 221.5 billion (USD 1.6 billion), which represent a year-on-year increase of +3.9% and a decrease of -15.2% compared to 2019.

Once again, national and animation films were the winners of the year. Local productions claimed 67% of grosses, continuing a 4-year trend that sees national films accounting for the highest shares of total box office since the early 1960s. Japanese films earned 8 spots in the country's yearly top ten and were led by anime box office hits *The First Slam Dunk* (more than 10 million admissions in Japan since its 2022 release), *Detective Conan: Black Iron Submarine* (9.7 million admissions) and *The Boy and the Heron* (5.8 million admissions). The most successful film of the year was the US/JP animation feature *The Super Mario Bros. Movie*, based on the popular Japanese video games character, which sold more than 9.8 tickets in the country.

Production and funding

2023 was second only to 2019 in terms of number of national films released (676 titles). In parallel to the vibrant production sector, the export of Japanese films has seen a steady rise since the early 2010s, surging to a peak of approximately USD 480 million in 2023. The new high is attributable to the global success of recent anime titles like *Suzume*, *The First Slam Dunk*, and *The Boy and the Heron*, alongside the record-breaking performance of *Godzilla Minus One*, which became the highest-grossing live-action Japanese film in North America. These achievements reflect a growing focus on international strategy within the industry. With the domestic market approaching saturation and limited growth potential, the international market presents an appealing opportunity for the Japanese film industry to further expand its reach.

To further boost the production sector, the first official location production incentive scheme in Japan was announced in 2023. The new scheme, aimed at film and TV large-scale production, offers reimbursement of up to 50% of qualifying expenditure in Japan, with an upper limit of around JPY 1 billion (USD 6.5 million).

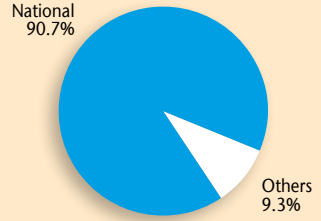
Sources: EIREN, *Variety*, *Screen International*, *The Japan Times*, *Yomiuri Shimbun*

India

Population 2023 ^e	1 428.6 million
GDP per capita 2023 ^e	2 612 USD
Gross box office 2023 ^e	122.26 bn INR (1.48 bn USD)
Admissions 2023 ^e	900.0 million
Average ticket price 2023 ^e	130.0 INR (1.6 USD)
Average admissions per capita 2023 ^e	0.6
Screens 2022 2023 ^e	9 382 9 742

(1) By GBO.

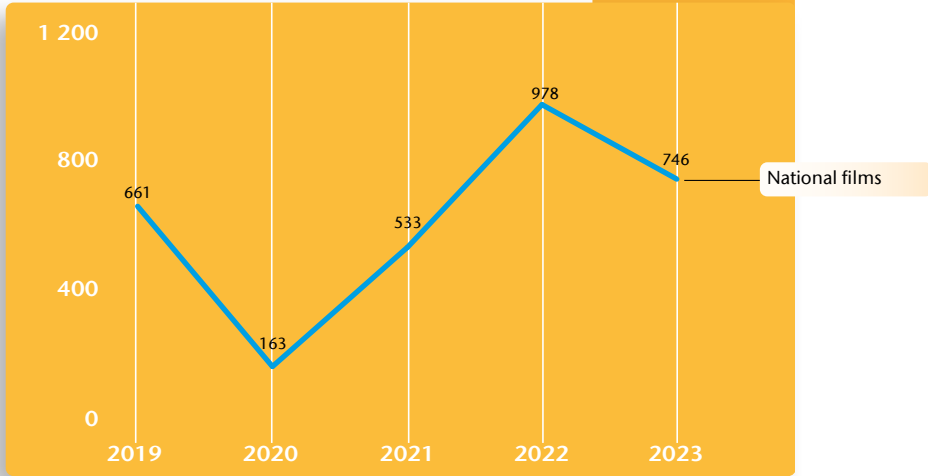
Market shares 2023^{(1) e}



Number of Indian feature films released | 2019-2023⁽¹⁾

In units.

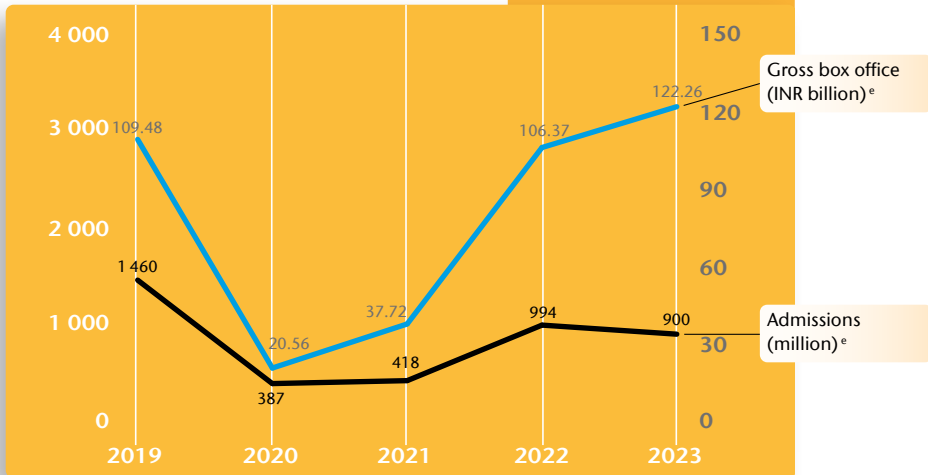
Source: Ormax Media



(1) Does not include films with a GBO lower than 100 000 INR (1 211 USD).

Admissions and gross box office in India | 2019-2023⁽¹⁾

Sources: Ormax Media/FICCI-EY



(1) Admissions are estimated based on footfall figures (the number of people walking into a theatre in a particular period of time).

Top 20 films by gross box office in India | 2023

GBO calculated using an average exchange rate of 1 USD = 82.6 INR

Original title	Country of origin	Director(s)	Gross box office (in USD)
1 Jawan	IN	Atlee Kumar	88 862 764
2 Animal	IN	Sandeep Reddy Vanga	78 087 851
3 Pathaan	IN	Siddharth Anand	76 998 253
4 Gadar 2	IN	Anil Sharma	74 940 124
5 Salaar: Part 1 - Ceasefire	IN	Prashanth Neel	61 986 015
6 Jailer	IN	Nelson Dilipkumar	49 395 106
7 Leo	IN	Lokesh Kanagaraj	49 152 973
8 Adipurush	IN	Om Raut	39 346 592
9 Tiger 3	IN	Maneesh Sharma	38 620 193
10 The Kerala Story	IN	Sudipto Sen, Vipul Amrutlal Shah	32 082 605
11 Dunki	IN	Rajkumar Hirani	30 508 742
12 Ponnaiyin Selvan: Part 2	IN	Mani Ratnam	25 787 151
13 Varisu	IN	Vamshi Paidipally	25 423 952
14 Waltair Veerayya	IN	Bobby Kolli	21 913 025
15 Rocky Aur Rani Kii Prem Kahaani	IN	Karan Johar	21 428 759
16 OMG 2	IN	Amit Rai	21 186 626
17 Oppenheimer	US/GB	Christopher Nolan	19 128 497
18 Tu Jhoothi Main Makkaar	IN	Luv Ranjan	18 644 231
19 Fast X	US	Louis Leterrier, Justin Lin	16 343 969
20 Thunivu	IN	H. Vinoth	16 222 902

Source: Ormax Media

Distribution and exhibition

2023 was a record-breaking year for Indian box office, as it reached an all-time high of INR 122.3 billion (USD 1.48 billion), representing a +14.9% year-on-year growth. The growth was mostly driven by an increase in cinema ticket prices, as admissions are estimated to have decreased to 900 million (-9.5% compared to the previous year).

Box office receipts of films in Hindi language experienced an important growth of 53% in 2023, accounting for 44% of total revenues in the country. The four most successful films in the country were all Hindi action film productions: *Jawan*, *Animal*, *Pathaan*, and *Gadar 2*. Telugu films also experienced a growth of 6% in 2023, accounting for 19% of the national box office. The most successful Telugu films of the year were *Saar: Part 1 - Ceasefire*, an epic action film, and the Telugu/Hindi production *Adipurush*, an epic action film considered as one of the most expensive Indian productions of all time. Two Tamil language films, *Jailer* and *Leo*, made it to the Indian top 10 of the year, helping Tamil productions to retain their 15% share of total box office. Revenues of Hollywood films decreased by 7% in 2023. The most successful American film in the country was *Oppenheimer*, in 17th place.

International revenues also continued to grow in 2023, generating INR 19 billion (USD 230 million) thanks to the released of 339 films across the globe.

Production and funding

India is increasing its effort to attract international film projects to the country through revised production incentives. It was announced in November of last year that the government will reimburse up to 40% of qualifying production expenses for international projects that are granted shooting permission. The cap limit has additionally been substantially increased to INR 300 million (USD 3.6 million).

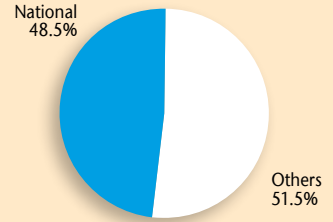
The reform coincides with an era of continued growth for the Indian film industry, which is on the brink of expanding both domestically and in terms of global content export. Although cinema-going is still perceived as a luxury experience, economic progress, bolstered by an increasing number of screens and the creation of compelling high-quality productions, is expected to extend this experience to a broader spectrum of the Indian population in the coming years.

Sources: Ormax Media, FICCI- EY, Variety, Screen International

South Korea

Population 2023*	51.6 million
GDP per capita 2023*	33 147 USD
Gross box office 2023	1 261.4 bn KRW (966.1 M USD)
Admissions 2023	125.1 million
Average ticket price 2023	10 083.1 KRW (7.7 USD)
Average admissions per capita 2023	2.4
Screens 2022 2023	3 322 3 371

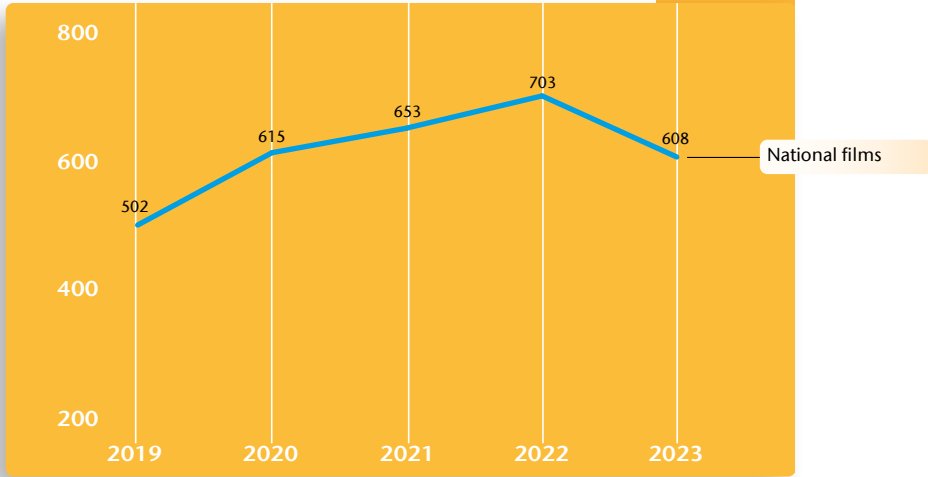
Market shares 2023



Number of Korean feature films released | 2019-2023

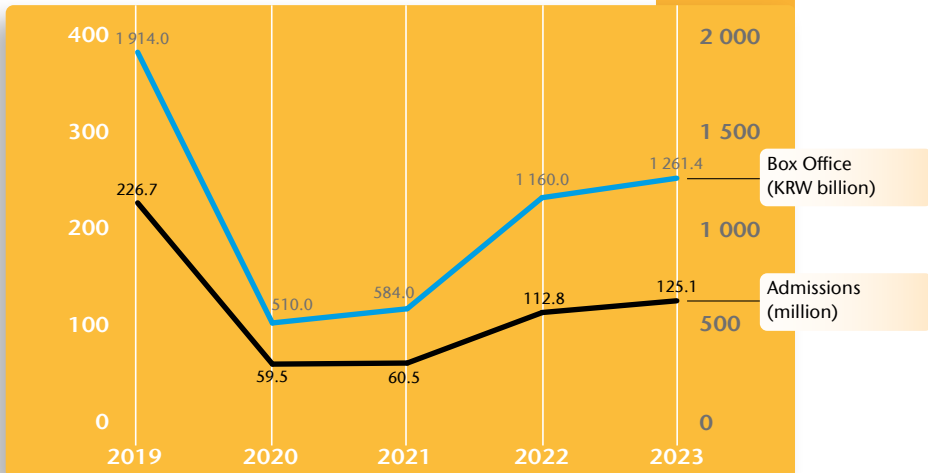
In units.

Source: KOFIC



Admissions and gross box office in South Korea | 2019-2023

Source: KOFIC



Top 20 films by admissions in South Korea | 2023

	Original title	Country of origin	Director(s)	Distributor	Admissions
1	12.12: The Day	KR	Sung-soo Kim	Plus M	11 854 811
2	The Roundup: No Way Out	KR	Sang-yong Lee	ABO, Plus M	10 682 813
3	Elemental	US	Peter Sohn	Disney	7 238 453
4	Suzume	JP	Makoto Shinkai	Showbox	5 574 358
5	Smugglers	KR	Seung-wan Ryu	Next Entertain. World	5 143 219
6	The First Slam Dunk	JP	Takehiko Inoue	Next Entertain. World	4 786 406
7	Guardians of the Galaxy Vol. 3	US	James Gunn	Disney	4 209 118
8	Mission: Impossible - Dead...	US	Christopher McQuarrie	Lotte	4 022 072
9	Concrete Utopia	KR	Tae-hwa Eom	Lotte	3 849 242
10	Avatar: The Way of Water	US	James Cameron	Disney	3 491 916
11	Noryang: Deadly Sea	KR	Han-min Kim	Lotte	3 437 833
12	Oppenheimer	US/GB	Christopher Nolan	Universal	3 232 774
13	The Super Mario Bros. Movie	US/JP	A. Horvath, M. Jelenic, ... ⁽¹⁾	Universal	2 395 519
14	Love Reset	KR	Dae-joong Nam	Mindmark	2 165 358
15	The Boy and the Heron	JP	Hayao Miyazaki	Megabox	2 009 401
16	John Wick: Chapter 4	US/DE	Chad Stahelski	Redice Entertainment	1 924 768
17	Dr. Cheon And The Lost...	KR	Seong-sik Kim	CJ Entertainment	1 916 429
18	Fast X	US	Louis Leterrier, Justin Lin	Universal	1 773 424
19	The Point Men	KR	Soon-rye Yim	Plus M	1 721 100
20	Ant-Man and the Wasp: ...	US	Peyton Reed	Disney	1 551 129

(1) Pierre Leduc, Fabien Polack

Source: KOFIC

Distribution and exhibition

Despite experiencing the first full calendar year without restrictions linked to the COVID-19 pandemic, the South Korean exhibition sector slowed its pace towards full recovery in 2023. Admissions grew by a comparatively low 10.9% in 2023, settling at 125.1 million, down 44.8% compared to 2019. Similarly, box office figures grew by a modest 8.7%, reaching KRW 1 261.4 billion (USD 966.1 million).

Domestic productions accounted for 48.5% of tickets sold, a decrease of 7 percentage points compared to the previous year (55.7%), and were led by the only two films that managed to cross the 10 million admissions threshold: *12.12: The Day*, a historical drama, and *The Roundup: No Way Out*, the third instalment of the highly profitable action crime franchise.

Hollywood blockbuster hits that helped boost box office figures across the world had a more limited impact in South Korea in 2023. The only American titles in the Top 10 were *Elemental* (#3), *Guardians of the Galaxy Vol. 3* (#7), *Mission: Impossible - Dead Reckoning Part One* (#8), and the 2022 release *Avatar: The Way of Water* (#10). Two anime features from Japan completed the Top 10: *Suzume* (#4) and *The First Slam Dunk* (#6).

Overall, 1 410 films were released in Korean cinemas in 2023 (608 national films), a decrease

of 14% compared to 2022 (1 643 films, of which 703 were national films).

Production and funding

In its 50th year, The Korean Film Council (KOFIC) expressed concern about the post-pandemic state of the national film industry. In addition to disappointing box office numbers, a backlog of more than 100 unreleased films was preventing new films from securing financing. Furthermore, state funding that supported many branches of the industry has faced significant cuts. To revitalize the industry, the KOFIC is committed to finding new funding sources and is looking to revive its support to facilitate co-productions with neighbouring countries. In 2023, the KOFIC additionally helped establish the Asia Film Alliance Network (AFAN) to promote understanding, solidarity, and cooperation between Asian film creators and communities.

On a positive note, the Busan International Film Festival's Asia Contents & Film Market had a record-breaking participation rate in 2023, with a total of 2 479 professionals from 49 countries taking part in the industry event. Lastly, the streaming giant Netflix announced in 2023 its plan to invest USD 2.5 billion in Korean content in the near future.

Sources: KOFIC, *Screen International*, *Variety*, *The Korea Times*

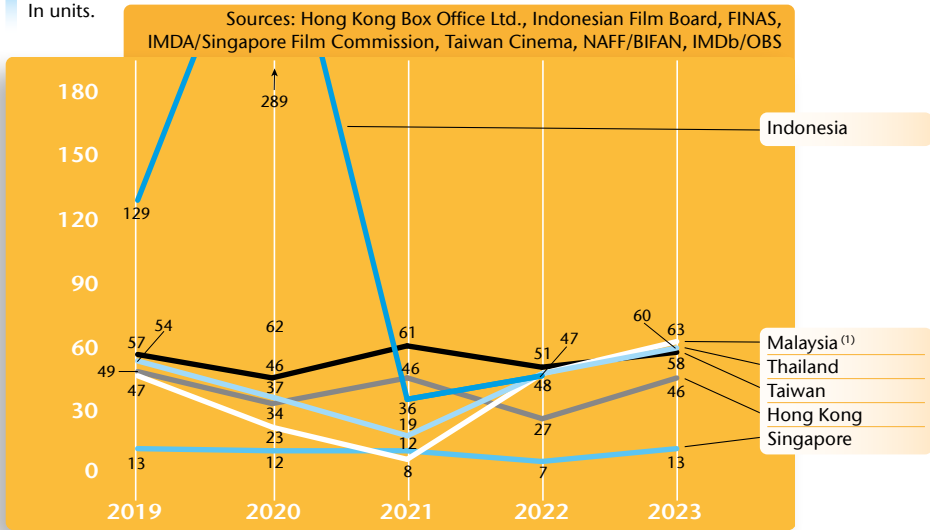
Other Asia

	Hong Kong	Indonesia	Malaysia	Singapore	Taiwan	Thailand
Population 2022 ^e (million)	7.5	277.4	33.1	5.7	23.3	70.2
GDP per capita 2023 ^e (USD)	51 168	5 109	13 034	87 884	32 340	7 298
Gross box office 2023 (M USD)	183.0	333.0	134.1	74.5	245.8	66.6 ⁽¹⁾
Admissions 2023 (million)	18.0	114.0	34.9	10.0	29.2	–
Average ticket price 2023 (USD)	10.2	2.9	3.8	7.4	8.4	–
Average admissions per capita 2023	2.4	0.4	1.1	1.8	1.3	–
Screens 2023	282	2 145 ⁽¹⁾	1 232	277	955	1 321 ⁽²⁾
National market shares 2023	23.0% ⁽³⁾	46.6%	16.6% ⁽³⁾	7.7% ⁽³⁾	16.7%	18.0% ⁽¹⁾

(1) 2022 (2) 2020 (3) By GBO

Number of national films released in selected Asian countries | 2019-2023^e

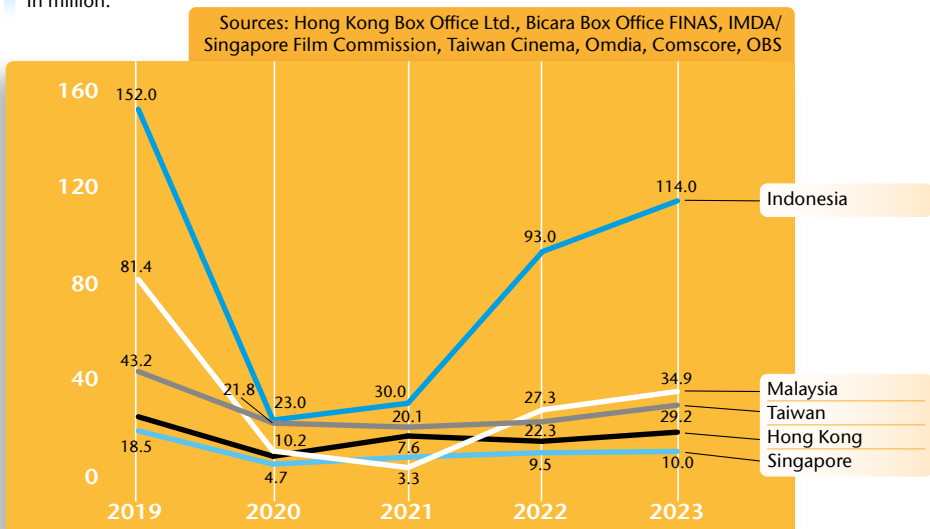
In units.



(1) Number of films produced.

Admissions in selected Asian countries | 2019-2023^e

In million.



Top 10 films by admissions in Hong Kong | 2023

	Original title	Country of origin	Director(s)	Distributor	Admissions
1	A Guilty Conscience	HK	Wai-Lun Ng	Edko	1 585 046
2	The Super Mario Bros. Movie	US/JP	A. Horvath, M. Jelenic, ... ⁽¹⁾	Universal	799 045
3	Barbie	US/GB	Greta Gerwig	Warner Bros.	579 045
4	The First Slam Dunk	JP	Takehiko Inoue	MediaLink	551 570
5	Mission: Impossible - Dead...	US	Christopher McQuarrie	Paramount	551 272
6	Oppenheimer	US/GB	Christopher Nolan	Universal	526 275
7	Guardians of the Galaxy Vol. 3	US	James Gunn	Disney	454 973
8	Elemental	US	Peter Sohn	Disney	427 274
9	Suzume	JP	Makoto Shinkai	Intercontinental	413 869
10	John Wick: Chapter 4	US/DE	Chad Stahelski	Intercontinental	349 503

(1) Pierre Leduc, Fabien Polack

Sources: OBS/LUMIERE, Comscore

Top 10 films by admissions in Taiwan | 2023

	Original title	Country of origin	Director(s)	Distributor	Admissions
1	The First Slam Dunk	JP	Takehiko Inoue	A Really Happy Film	1 799 706
2	Mission: Impossible - Dead...	US	Christopher McQuarrie	Paramount	1 543 936
3	Marry My Dead Body	TW	Wei-hao Cheng	Bole Film	1 474 673
4	Fast X	US	Louis Leterrier, Justin Lin	Universal	1 336 923
5	Avatar: The Way of Water	US	James Cameron	Disney	1 222 574
6	The Super Mario Bros. Movie	US/JP	A. Horvath, M. Jelenic, ... ⁽¹⁾	Universal	1 171 686
7	Suzume	JP	Makoto Shinkai	GaragePlay	967 158
8	John Wick: Chapter 4	US/DE	Chad Stahelski	GaragePlay	849 294
9	Detective Conan: Black Iron...	JP	Yuzuru Tachikawa	Proware International	717 580
10	Oppenheimer	US/GB	Christopher Nolan	Universal	714 839

(1) Pierre Leduc, Fabien Polack

Source: Taiwan Film and Audiovisual Institute

Distribution and exhibition

Cinema attendance increased across various Asian markets for which data were available. In Hong Kong, admissions rose by more than 25% to 18 million, rebounding from a challenging 2022 marked by cinema closures. The local production *A Guilty Conscience* topped the 2023 box office with over 1.5 million admissions, becoming the highest-grossing local film of all time in the country.

In Indonesia, local productions had a successful year, with a record 18 films surpassing one million admissions. *Sewu Dino*, based on a viral Twitter thread, was the most-watched film of the year, with 4.89 million admissions.

The top ten films in Malaysia at year-end were also led by a local title: *Polis Evo 3*, which also ranks as the second-highest-grossing Malaysian film of all time.

Despite the challenges faced by Singaporean films in achieving comparable success at the local box office, 2023 witnessed the inclusion of over 10 local (co-)productions in the line-up of A-list film festivals worldwide. This accomplishment serves as a ray of hope for the country's film industry, particularly amidst its current struggle with one of

the lowest recovery rates in the region: a -45.8% decline in admissions compared to 2019.

While aggregate box office figures are not available, local productions in Thailand reportedly had their most successful year in a decade, generating THB 2 billion (USD 57.5 million) in 2023. The top-grossing film of the year was *The Undertaker*, a comedy thriller shot in the Isan dialect, exceeding expectations and grossing over THB 720 million (USD 20.7 million) nationwide.

Production and funding

Reflecting the global trend of attracting film productions through production incentives, the Philippines increased its cash rebate to 25%, capped at USD 540 000. Similarly, Thailand doubled the upper limit of its 20% tax refund to USD 4.3 million.

In an effort to enhance international relations, the Hong Kong Film Development Council introduced a new scheme supporting international co-productions with Europe, offering grants of up to USD 1.1 million per project. Likewise, Singapore's IMDA established a new USD 30 million fund to facilitate co-productions between local companies and international partners.

Sources: Hong Kong Box Office Ltd, FINAS, Indonesia Film Board, Bicara Box Office, IMDA/Singapore Film Commission, *Deadline*, *Variety*, *Screen International*, *Bangkok Post*

Africa

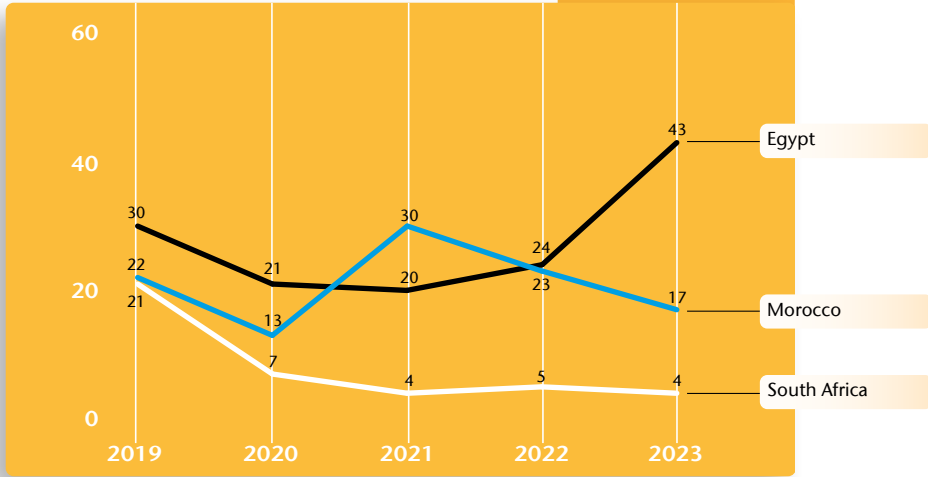
	Egypt	Morocco	Nigeria	South Africa
Population 2023* (million)	105.7	37.0	222.2	61.5
GDP per capita 2023* (USD)	3 770	3 980	1 755	6 191
Gross box office 2023* (in M USD)	42.0	7.6 ⁽¹⁾	11.5	37.4
Admissions 2023* (million)	8.5 ⁽²⁾	1.5 ⁽¹⁾	2.6	7.6
Admissions per capita 2023*	0.08 ⁽²⁾	0.04 ⁽¹⁾	0.01	0.12
Average ticket price 2023* (in USD)	5.0 ⁽²⁾	5.1 ⁽¹⁾	4.4	4.9
Screens 2023	250 ⁽²⁾	78 ⁽¹⁾	275 ⁽¹⁾	644
National market shares 2023*	55.7% ⁽³⁾	36.2% ⁽¹⁾	39.0%	1.0%

(1) 2022 (2) 2021 (3) By GBO

Number of feature films released in selected African countries | 2019-2023

In units.

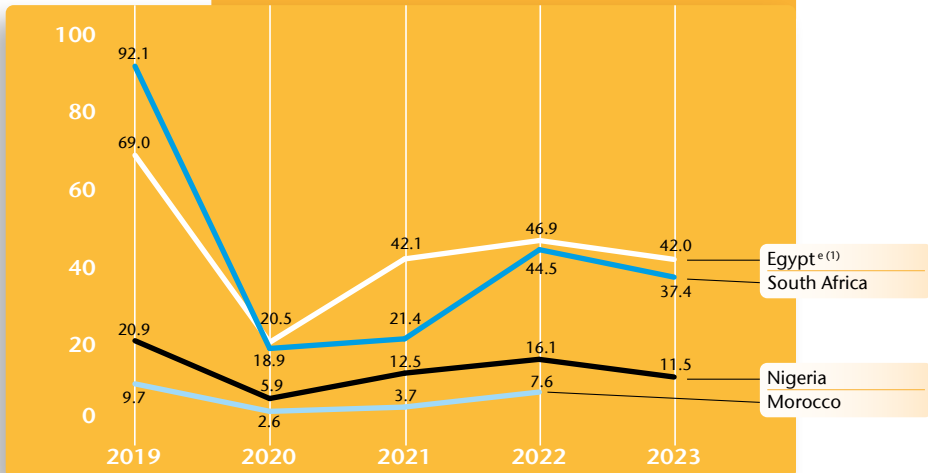
Sources: CCM, NFVF, OBS



Gross box office in selected African countries | 2019-2023

In USD million.

Sources: Filmfinity, ECES, elCinema, Arab Motion, CEAN, CCM, OBS



(1) 2020-2023 figures are estimates based on data disclosed by elCinema and Arab Motion.

Top 10 films by admissions in South Africa | 2023

Original title	Country of origin	Director(s)	Distributor	Admissions
1 Barbie	US/GB	Greta Gerwig	Empire Entertain.	561 113
2 Fast X	US	Louis Leterrier, Justin Lin	UIP	439 547
3 Avatar: The Way of Water	US	James Cameron	Filmfinito	432 610
4 John Wick: Chapter 4	US/DE	Chad Stahelski	Filmfinito	327 499
5 The Little Mermaid	US	Rob Marshall	Filmfinito	305 173
6 The Super Mario Bros. Movie	US/JP	A. Horvath, M. Jelenic, ... ⁽¹⁾	UIP	294 677
7 Wonka	US/GB	Paul King	Empire Entertain.	279 186
8 Aquaman and the Lost Kingdom	US	James Wan	Empire Entertain.	259 631
9 Spider-Man: Across the Spider...	US	Joaquim Dos Santos, ... ⁽²⁾	Filmfinito	245 293
10 Mission: Impossible - Dead...	US	Christopher McQuarrie	UIP	224 604

(1) Pierre Leduc, Fabien Polack

(2) Kemp Powers, Justin K. Thompson

Source: Filmfinito

Top 10 US films by admissions in Egypt | 2023

Partial data due to unreported results

Original title	Country of origin	Director(s)	Distributor	Admissions
1 Oppenheimer	US/GB	Christopher Nolan	Majid Al Futtaim	404 158
2 Meg 2: The Trench	US/CN	Ben Wheatley	United Motion Pict.	302 817
3 Mission: Impossible - Dead...	US	Christopher McQuarrie	Four Star Films	250 945
4 Fast X	US	Louis Leterrier, Justin Lin	Majid Al Futtaim	250 336
5 The Nun II	US	Michael Chaves	United Motion Pict.	227 643
6 John Wick: Chapter 4	US/DE	Chad Stahelski	Italia Film	166 935
7 Barbie	US/GB	Greta Gerwig	United Motion Pict.	147 608
8 Evil Dead Rise	US/NZ/IE	Lee Cronin	United Motion Pict.	121 794
9 The Flash	US	Andy Muschietti	United Motion Pict.	87 721
10 Insidious: The Red Door	US/CA	Patrick Wilson	Empire	80 695

Source: Arab Motion

South Africa

In 2023, cinema admissions in South Africa fell to 7.6 million, down from 8.5 million in 2022, marking a 59% decrease from 2019. Several factors are contributing to the challenging recovery. Firstly, the industry never fully rebounded from the COVID-19 pandemic, with streaming services' popularity and rising ticket prices diverting consumers from cinemas in the post-reopening phase. Economic instability and energy constraints further burdened cinema operators and South African citizens, who are adapting to a new reality which is distinct from pre-pandemic habits. Additionally, disruptions in cinema release schedules due to the industry strikes in the United States impacted the local exhibition sector, where Hollywood films account for the overwhelming majority of box office revenues and films available. Local productions (whose market share was 1% in 2023) struggle to secure financing and are decreasing in number. In 2023, only 4 national feature films were released in theatres. The industry's challenges are mirrored in the dwindling number of cinema screens. Last year, 644 screens were in operation in the country, representing a 17% decrease from 2019.

Nigeria

Cinemas in Nigeria grossed over NGN 7.2 billion (USD 11.5 million) in 2023, up from 6.8 in 2022 (+6.1%). The positive trend can be attributed to rising ticket prices, which are becoming gradually less affordable by the general public. The number of admissions has indeed decreased for the third year in a row, from 3.4 million in 2021 to 2.6 million in 2023. Over 14% of box office revenues in 2023 are to be attributed to the feature film *A Tribe Called Judah* by director and actress Funke Akindele. *Tribe* is the first Nollywood film to hit the NGN 1 billion mark at the box office.

While high ticket prices and a limited number of screens are hampering Nigerian films in cinemas, online platforms are becoming the preferred distribution channels for Nollywood filmmakers and audiences alike. A recent survey by In Nollywood reported that 66.8% of respondents cited online platforms (including illegal websites) as their primary source of Nollywood films. Capitalizing on this trend, a growing number of local content is being released online by market leaders Netflix and Showmax (e.g. the global success *The Black Book*, released exclusively on Netflix worldwide).

Sources: NFNV, Filmfinito, CEAN, In Nollywood, ShockNG

Middle East

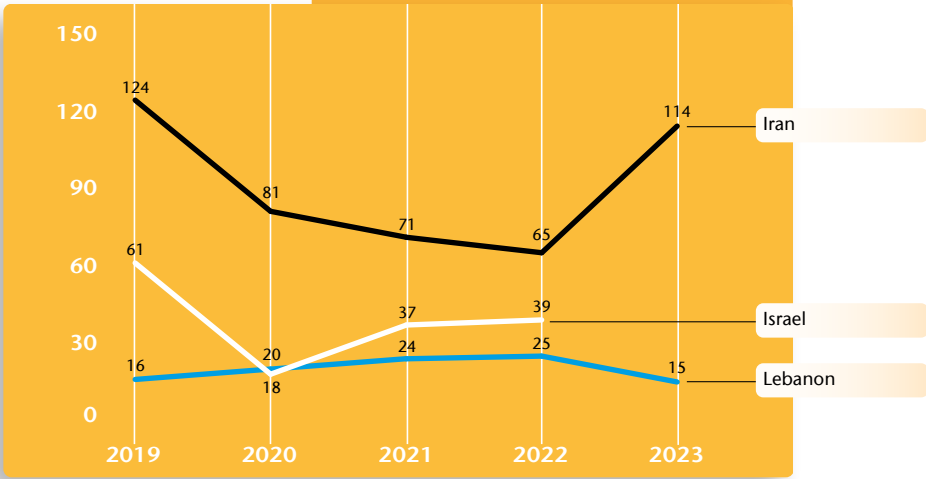
	Iran	Israel	Kuwait	Lebanon	Qatar	Saudi Arabia	United Arab Emirates
Population 2023 ^e (million)	86.5	9.8	5.0	6.6	2.9	32.8	10.1
GDP per capita 2023 ^e (USD)	4 234	53 196	32 215	3 283	81 968	32 586	50 602
Gross box office 2023 (in M USD)	276.6	115.2 ⁽¹⁾	62.6 ⁽³⁾	~	35.7	246.6	218.5
Admissions 2023 (million)	28.2	12.4 ⁽¹⁾	5.0 ⁽³⁾	1.4	2.5	17.7	15.5
Admissions per capita 2023	0.3	1.3 ⁽¹⁾	1.0	0.2	0.9	0.5	1.5
Average ticket price 2023 (USD)	9.8	9.3 ⁽¹⁾	12.5	~	14.4	13.9	14.1
Screens 2023	846	440 ⁽¹⁾	133	154 ⁽²⁾	139 ⁽²⁾	628	618 ⁽²⁾
National market shares 2023	98.0%	8.0% ⁽¹⁾	~	12.1%	~	~	~

(1) 2022 (2) 2020 (3) Partial data due to unreported results

Number of films released in selected Middle Eastern countries | 2019-2023^e

In units.

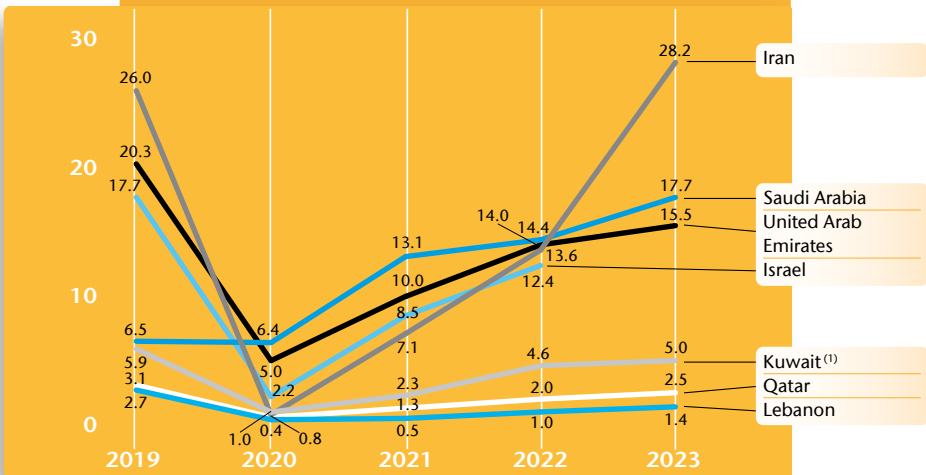
Sources: Iranian Independents, Israel Central Bureau of Statistics, Arab Motion, IMDb/OBS



Admissions in selected Middle Eastern countries | 2019-2023^e

In millions.

Sources: Iranian Independents, Arab Motion, Israel Central Bureau of Statistics



(1) Partial data due to unreported results.

Top 10 films by admissions in Iran | 2023

Original title	Country of origin	Director(s)	Admissions
1 Fossil	IR	Karim Amini	7 487 352
2 Hotel	IR	Seyed Massoud Atyabi	6 246 531
3 Smart Kid	IR	B. Nekui, H. Mohammadian, M.-J. Janati	1 922 363
4 Lawless City	IR	Karim Amini	1 823 135
5 Hawaii	IR	Bahman Goodarzi	1 696 411
6 Beach Villa	IR	Kianoush Ayari	1 361 165
7 Coconut 2	IR	Seyed Davoud Atyabi	732 670
8 No Entry and No Exit	IR	Omid Aghaie	699 661
9 Duet Song	IR	Arezou Arzanesh	456 612
10 A Passenger from Ganora	IR	Sayed Ahmad Alamdar	423 787

Source: Iranian Independents

Top 10 films by admissions in Saudi Arabia | 2023

Original title	Country of origin	Director(s)	Distributor	Admissions
1 Sattar	SA	Abdullah Al-Arak	Front Row Arabia	903 339
2 Oppenheimer	US/GB	Christopher Nolan	Majid Al Futtaim	704 429
3 Mission: Impossible - Dead...	US	Christopher McQuarrie	Four Star Films	598 053
4 Mr. Ex	EG	Ahmed Abdel Wahab	VOX	590 866
5 Sugar Daddy	EG	Mahmoud Karim	VOX	508 104
6 The Super Mario Bros. Movie	US/JP	A. Horvath, M. Jelenic, ... ⁽¹⁾	Majid Al Futtaim	493 091
7 The Equalizer 3	US	Antoine Fuqua	Empire	436 497
8 Fast X	US	Louis Leterrier, Justin Lin	Majid Al Futtaim	426 205
9 Baad El Shar	EG	Ahmed Abdel Wahab	VOX	426 183
10 Plane	US/GB	Jean-François Richet	Italia Film	391 961

(1) Pierre Leduc, Fabien Polack

Source: Arab Motion

Iran

Cinema attendance in Iran soared by a remarkable 106.7%, reaching a 5-year high of 28.2 million tickets sold. Total box office figures stood at IRR 11.6 trillion (USD 276.6 million), marking the highest result on record. National productions accounted for more than 98% of the box office, due to the limited number of screenings of international films in public theatres. Comedies occupied the first five position of the year-end top 10, which alone accounted for 63% of the aggregate box office totals.

The most successful film of the year was *Fossil*, a comedy set in 1970s pre-revolution Iran, which was seen by 7.5 million cinemagoers and stands as the highest-grossing film ever in the country in terms of box office revenues. While most films available in Iran were either government-backed productions or low-budget comedies, an important slate of 68 independent Iranian films (or foreign films by Iranian filmmakers) found success internationally, being screened at festivals and events across the globe.

Saudi Arabia

Admissions in Saudi Arabia continued to grow in 2023, reaching 17.7 million (+23.6%). However, box office figures saw a more limited increase (+1.9%) due to decreasing ticket prices. With the Saudi Film Commission's announcement in April 2024 of a significant reduction in cinema license costs to further stimulate the industry, cinema prices are expected to decrease even further.

The most successful film in the country was the local production *Sattar*, an action comedy set in the Saudi wrestling world, which sold more than 900 000 tickets and became the most successful Saudi film of all time. Four Egyptian and six American productions completed the top 10.

The film industry is rapidly evolving in the Kingdom, with 69 cinemas and 628 screens now in operation (notably, the first cinema opened in Saudi Arabia in 2018). While international productions are increasingly benefiting from Saudi Arabia's production incentives and studio facilities, two recently announced film funds worth a total of USD 180 million are expected to further bolster local and regional Arabic film projects.

Sources: Iranian Independents, Arab Motion, *Variety*, *Screen International*

Sources (ranked by country)

FOCUS 2024 was prepared by the European Audiovisual Observatory. We would like to thank the following sources:

INCAA	AR	incaa.gov.ar	ANICA	IT	anica.it
Österreichisches Filminstitut (ÖFI)	AT	filminstitut.at	Cinetel	IT	cinetel.it
MPDAA	AU	mpdaa.org.au	DG Cinema e audiovisivo – Ministero della Cultura (MiC)	IT	cinema.cultura.gov.it
Screen Australia	AU	screenaustralia.gov.au	SIAE	IT	siae.it
Sarajevo Film Festival (SFF)	BA	sff.ba	Motion Picture Association of Japan (EIREN)	JP	eiren.org
Centre du cinéma et de l'audiovisuel (CFWB)	BE	audiovisuel.cfwb.be	Korean Film Council (KOFIC)	KR	koreanfilm.or.kr
Cinedata	BE		Lithuanian Film Center	LT	lkc.lt
Vlaams Audiovisueel Fonds (VAF)	BE	vaf.be	Centre national de l'audiovisuel (CNA)	LU	cna.public.lu
National Film Center (NFC)	BG	nfc.bg	Film Fund Luxembourg	LU	filmfund.lu
ADECINE	BO	adecine.gob.bo	National Film Centre of Latvia (NFC)	LV	nfc.lv
ANCINE	BR	ancine.gov.br	Centre Cinématographique Marocain (CCM)	MA	ccm.ma
Canadian Media Prod. Assoc. (CMPA)	CA	cmpa.ca	Film Centre of Montenegro	ME	mku.gov.me
Statistics Canada	CA	statcan.gc.ca	North Macedonian Film Agency	MK	filmfund.gov.mk
Office fédéral de la statistique (OFS)	CH	admin.ch/bfs	IMCINE	MX	imcine.gob.mx
Ministerio de las Culturas, las Artes y el Patrimonio	CL	cultura.gob.cl	National Film Development Corporation of Malaysia (FINAS)	MY	finas.gov.my
China Film Administration	CN	chinafilm.gov.cn	Cinema Exhibitors Association of Nigeria (CEAN)	NG	ceanigeria.com
National Bureau of Statistics of China	CN	data.stats.gov.cn	In Nollywood	NG	innollywood.com
Ministerio de Cultura de Colombia	CO	mincultura.gov.co	Netherlands Association of Film Distributors (NVF)	NL	filmdistributeurs.nl
Dept. of Cultural Services (MOECSY)	CY	mocec.gov.cy	Dutch Exhibitors Association (NVBF)	NL	denvbf.nl
Czech Film Fund	CZ	fondkinematografie.cz	MaccsBox	NL	maccsbox.nl
Unie Filmovych Distributoru (UFD)	CZ	ufd.cz	Nederlands Filmfonds (NFF)	NL	filmfund.nl
FFA	DE	ffa.de	Film og Kino	NO	filmweb.no/filmogkino
SPIO	DE	spio.de	Norsk Filminstitutt (NFI)	NO	nfi.no
Danish Film Institute (DFI)	DK	dfi.dk	MPDA	NZ	mpda.org.nz
Statistics Denmark	DK	dst.dk	New Zealand Film Commission	NZ	nzfilm.co.nz
Dirección General de Cine República Dominicana (DGCINE)	DO	dgcine.gob.do	Ministerio de Cultura del Perú	PE	cultura.gob.pe
Instituto de Cine y Creación Audiovisual (ICCA)	EC	cineraudiovisual.gob.ec	Film New Europe	PL	filmneweurope.com
Estonian Film Institute	EE	filmi.ee	Polish Film Institute (PISF)	PL	pisf.pl
Central Agency for Public Mobilization and Statistics (CAPMAS)	EG	capmas.gov.eg	Instituto do Cinema e do Audiovisual (ICA)	PT	ica-ip.pt
Elcinema	EG	elcinema.com	Centrul National al Cinematografiei (CNC)	RO	cncinema.abt.ro
Egyptian Center for Economic Studies	EG	eces.org.eg	Russian Cinema Fund Analytics	RU	ekinobilet.fond-kino.ru
ICAA	ES	culturaydeporte.gob.es/cultura/areas/cine	Swedish Film Institute (SFI)	SE	sfi.se
Europa Cinemas	EU	europa-cinemas.org	Singapore Film Commission / IMDA	SG	imda.gov.sg
Eurostat	EU	ec.europa.eu/eurostat	Slovenski Filmski Center (SFC)	SI	film-center.si
MEDIA Salles	EU	mediasalles.it	Slovak Film Institute (SKFI)	SK	sfu.sk
UNIC	EU	unic-cinemas.org	NAFF BIFAN	TH	bifan.kr
Finnish Film Foundation (FFF)	FI	ses.fi	Antrakt	TR	antraktcinema.com
Centre national du cinéma et de l'image animée (CNC)	FR	cnc.fr	DG Sinema	TR	sinema.gov.tr
Le film français	FR	lefilmfrancais.com	Taiwan Cinema	TW	taiwancinema.com
British Film Institute (BFI)	GB	bfi.org.uk	MPA	US	motionpictures.org
Greek Film Center	GR	gfc.gr	National Association for Theatre Owners (NATO)	US	theatreowners.org
Hong Kong Box Office Ltd	HK	hkbo.com.hk	Dirección del Cine y Audiovisual Nacional (ICAU)	UY	ica.u.nec.gub.uy
Hong Kong Theatre Association (HKTA)	HK	hkta.org.hk	Filmfinitiy	ZA	teamfinitiy.org.za
Croatian Audiovisual Centre (HAVC)	HR	havc.hr	National Film and Video Fund (NFVF)	ZA	nfvf.co.za
National Film Office (NFO)	HU	nemzetifilmiroda.hu	Arab Motion		comscore.com
Bicara Box Office	ID	bicaraoffice.wordpress.com	Comscore		comscore.com
Indonesian Film Board (Badan Perfilman Indonesia/BPI)	ID	bpi.or.id	International Monetary Fund		imf.org
Pearl & Dean	IE	pearlanddean.com	International Movie Database (IMDb)		imdb.com
Screen Ireland	IE	screenireland.ie	LUMIERE Database		lumiere.obs.coe.int
Central Bureau of Statistics of Israel	IL	cbs.gov.il	Observatório Iberoamericano do Audiovisual (OIA)		oia-caci.org
Israel Film Fund	IL	filmfund.org.il	Omdia		omdia.com
Ormax Media	IN	https://ormaxmedia.com	Screen International		screendaily.com
Box Office India	IN	https://boxofficeindia.com	The Hollywood Reporter		hollywoodreporter.com
Federation of Indian Chambers of Commerce and Industry (FICCI)	IN	ficci.in	The Numbers		the-numbers.com
Iranian Independents	IR		Variety		variety.com
Statistics Iceland (HI)	IS	statische.is	Deadline		deadline.com
Icelandic Film Centre	IS	icelandicfilmcentre.is	Reuters		reuters.com
			Gower Street Analytics		gower.st

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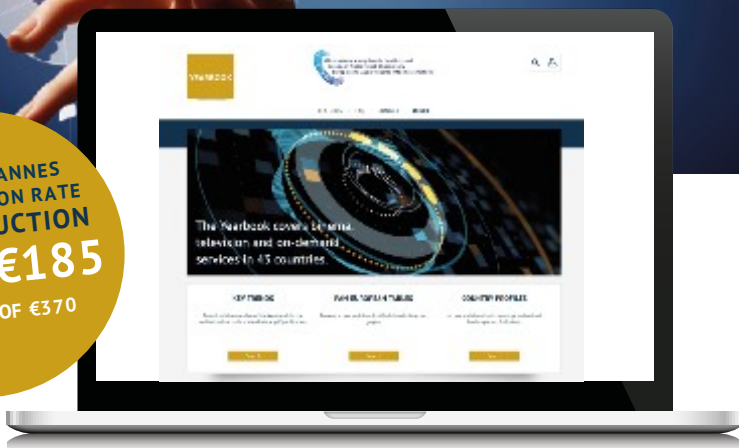
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