



Made in Europe

Theatrical distribution of European films across the globe
2014 - 2023

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01

Introduction

Purpose

What is the current state of theatrical distribution of European films?

This report delivers the latest insights into the global success and circulation of European films over the past decade. Published by the European Audiovisual Observatory, the study explores how European films are performing both domestically and internationally, highlighting key trends in major markets and regions. To showcase the diversity of European cinema, the report analyses the most active production countries and how their output and achievements have evolved over time. Additionally, it shines a spotlight on the top European films of the last 10 years, examining genre representation in theaters and their impact at the box office. Rather than focusing on film exports of individual European countries, the report provides a broader overview of European film circulation, sidestepping country-specific analyses that might require different methodological approaches.

About the European Audiovisual Observatory

The European Audiovisual Observatory is a European public service body that includes 40 member states and the European Union, represented by the European Commission. Operating under the Council of Europe, the Observatory collaborates with various partners and professional organisations across the audiovisual sector. Its mission is to collect, analyse, and publish information on Europe's film, TV, home entertainment, and on-demand industries.

Data sample

The insights in this report are based on an analysis of title-by-title annual admissions data provided by European national data sources (for European markets) and Comscore (for non-European markets and Sweden). The data for European markets is publicly available in the [LUMIERE database](#). The sample generally includes all feature films on release (at least one commercial theatrical screening) in the covered markets. This encompasses new releases and re-releases, holdovers, retrospectives, and paid festival screenings. Short film compilations, series, and alternative content screenings were excluded from the analysis.

The report includes admissions data from 53 markets worldwide (36 European and 17 non-European). However, for time series analyses, only markets with continuous admissions data between 2014 and 2023 were considered (45 markets, in bold in the table below). Aggregate admissions were estimated for Japan (2014, 2015, 2016) and Russia (2022, 2023).

Market region	Countries covered
Europe	Austria , Bosnia and Herzegovina, Belgium , Bulgaria , Switzerland , Cyprus , Czechia , Germany , Denmark , Estonia , Spain , Finland , France , United Kingdom , Georgia, Greece , Croatia , Hungary , Ireland , Iceland , Italy , Lithuania , Luxembourg, Latvia , Montenegro , North Macedonia , Netherlands , Norway , Poland , Portugal , Romania , Serbia, Sweden , Slovenia , Slovakia , Türkiye
North America	Canada , United States
Latin America	Argentina , Brazil , Chile , Colombia , Mexico , Venezuela
Asia	China , Hong Kong, Japan , South Korea , Singapore
Other markets	Australia , Morocco, New Zealand , Russia

Please note that differences in market coverage can affect the comparability of statistical indicators across years or countries. To address this, analyses on number of films in circulation only include titles that achieved at least 1 000 admissions worldwide in a given year, unless stated otherwise.

Definitions

Countries of origin

The Observatory adopts a pragmatic approach to defining the country of origin for films, based on the origin of a film's financing sources. In the case of international co-productions, the country contributing the largest share of financing is considered the primary country of origin, with other co-producing countries listed in descending order of their financial contributions. Please note that the assignment of countries of origin may differ from the criteria used by national film agencies or other organisations, which may lead to variations in related statistics.

European films

European films are those considered of European origin, meaning they are produced and predominantly financed by a European country. In this report, a European film is defined as a feature film produced and majority-financed by a member State of the Council of Europe. European minority co-productions are not considered European films in the context of this report.

European incoming productions

The Observatory defines "incoming productions" (INC films) as films produced in Europe but financed by a major American studio, making them more similar to Hollywood production titles than typical European films. Notable examples include the *Harry Potter* and *James Bond* franchises, primarily produced in the UK by Warner Brothers and MGM, respectively. Incoming productions (INC films) are not classified as European films in the context of this report.

Definitions

Exploitation markets

An exploitation market is defined as a country where a film receives theatrical distribution. In this report, a film is considered to be distributed theatrically if it achieves at least 1 000 aggregate admissions within a specified time period (a year for yearly figures or between 2014 and 2023 for aggregate figures). This threshold is set to exclude films shown only in single screenings, which do not qualify as having proper theatrical distribution.

National / export admissions

Throughout the report, admissions to European films are categorised into national and export admissions. National admissions refer to those occurring in the film's country of origin, as defined on page 6. Admissions in all other markets, including co-producing countries with minority shares, are considered export admissions.

Blockbuster films

In the context of this report, a blockbuster film is defined as a feature film that achieves at least one million admissions in a given year.

Methodology remarks

Conflicting results

This report focuses on providing a broad overview of European film circulation, rather than examining the film exports of individual European countries. As a result, the Observatory's methodology may differ from national approaches that aim to analyse film exports specific to their countries. Consequently, data in this report may vary significantly from national sources.

Coverage

Since this report relies solely on LUMIERE data, covering only 53 markets globally (with 45 tracked consistently from 2014 to 2023), the results may show some bias. Relative figures could be higher than actual ones, given the stronger representation of European markets where European film admissions are concentrated. Conversely, absolute figures will fall short due to missing admissions data from a range of global markets. The sample is estimated to cover 73% of total global admissions in 2023. In the context of this report, any remarks on global figures refer exclusively to the markets covered in the sample.

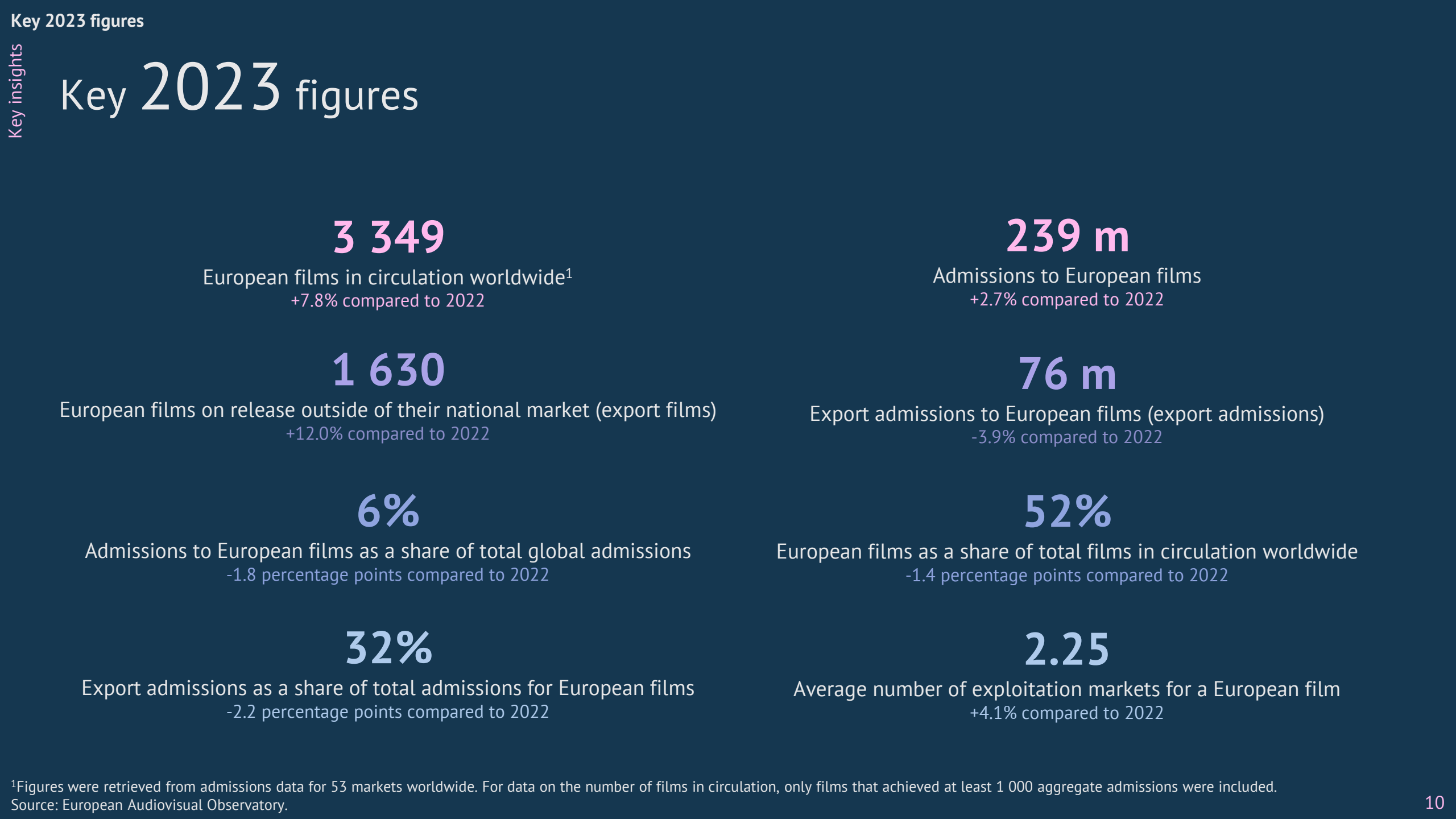
The influence of blockbusters

It is important to keep in mind that aggregate admissions figures can be highly influenced by the weight of a handful of extremely successful European “blockbusters” (films achieving more than one million admissions). Notably, between 2014 and 2017, five films with over 25 million admissions each accounted for a substantial share of aggregate admissions to European films. These films include *Lucy* (FR, 2014), *Paddington* (GB/FR, 2014), *Paddington 2* (GB/FR, 2017), *Taken 3* (FR, 2014), and *Valerian and the City of a Thousand Planets* (FR, 2017).

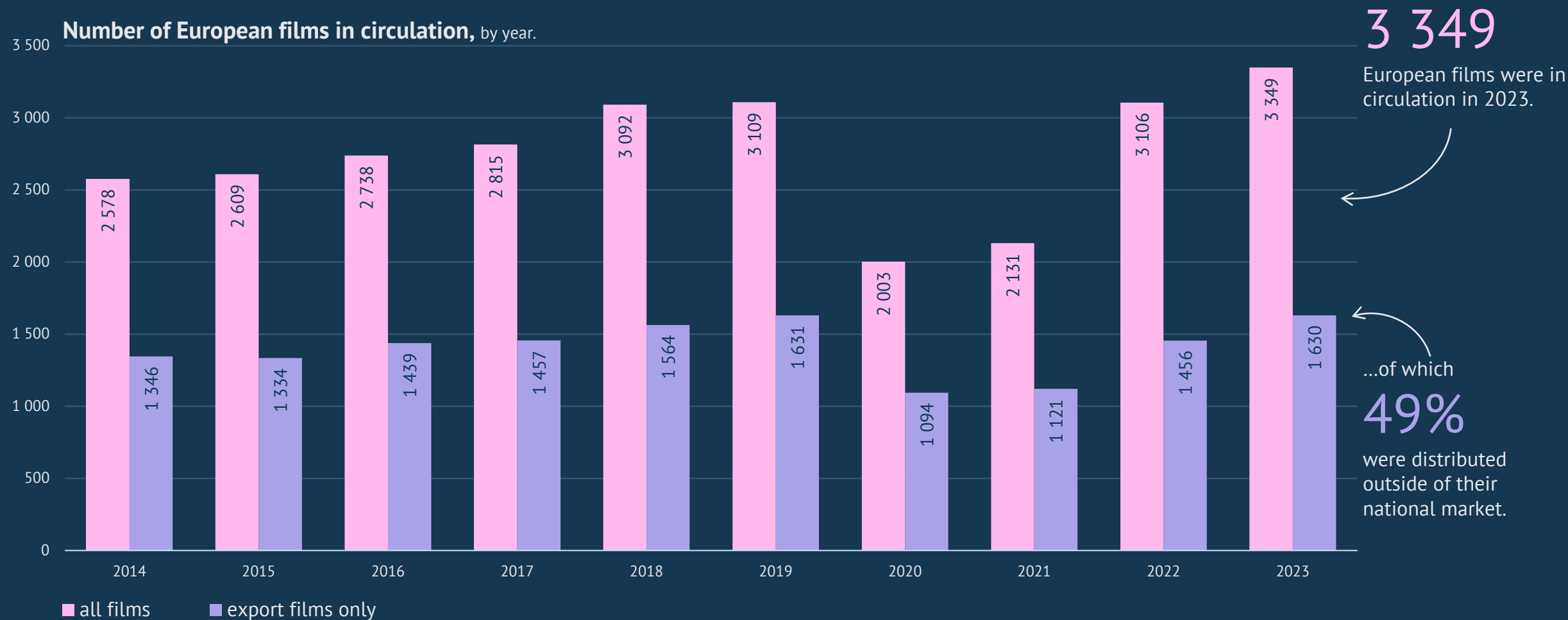


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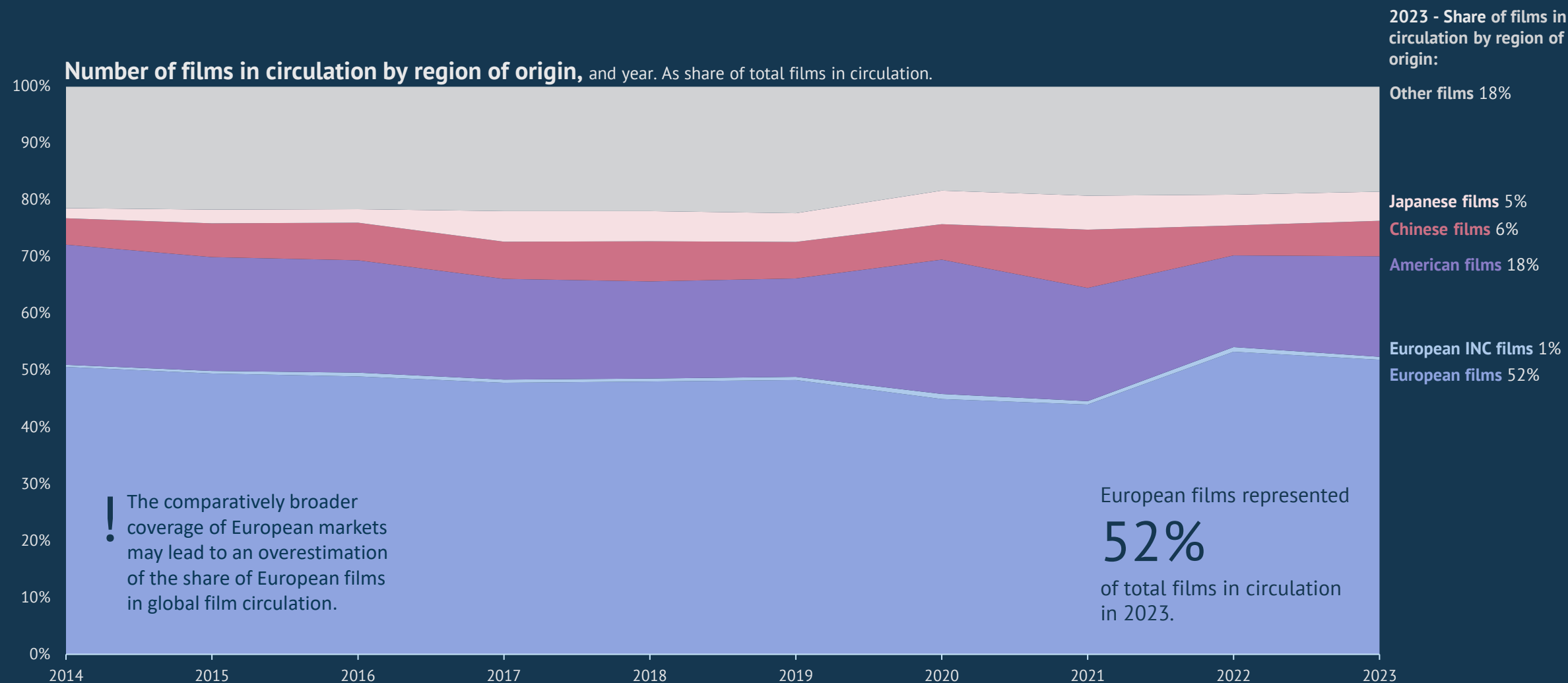
Key insights



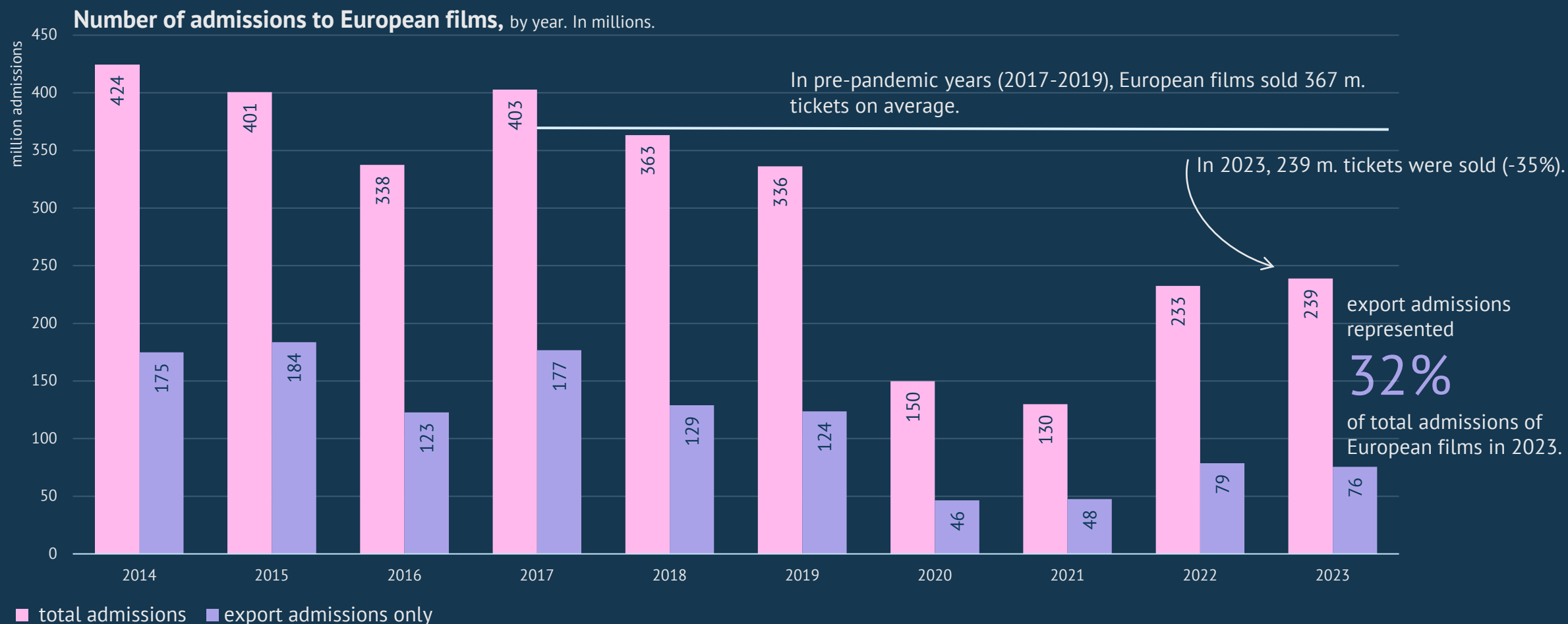
If we exclude pandemic years, the number of European films available in theatres has constantly risen in the past decade.



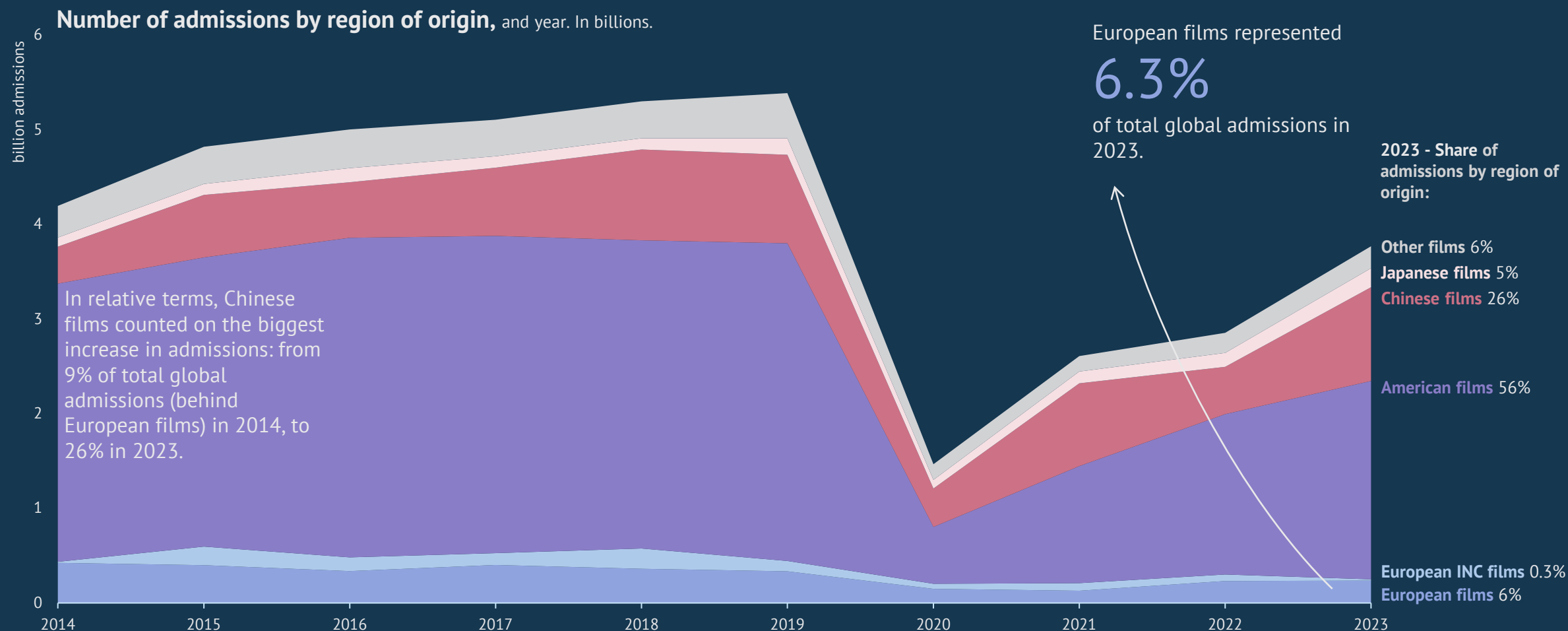
The majority of films available in cinemas around the world are European productions.



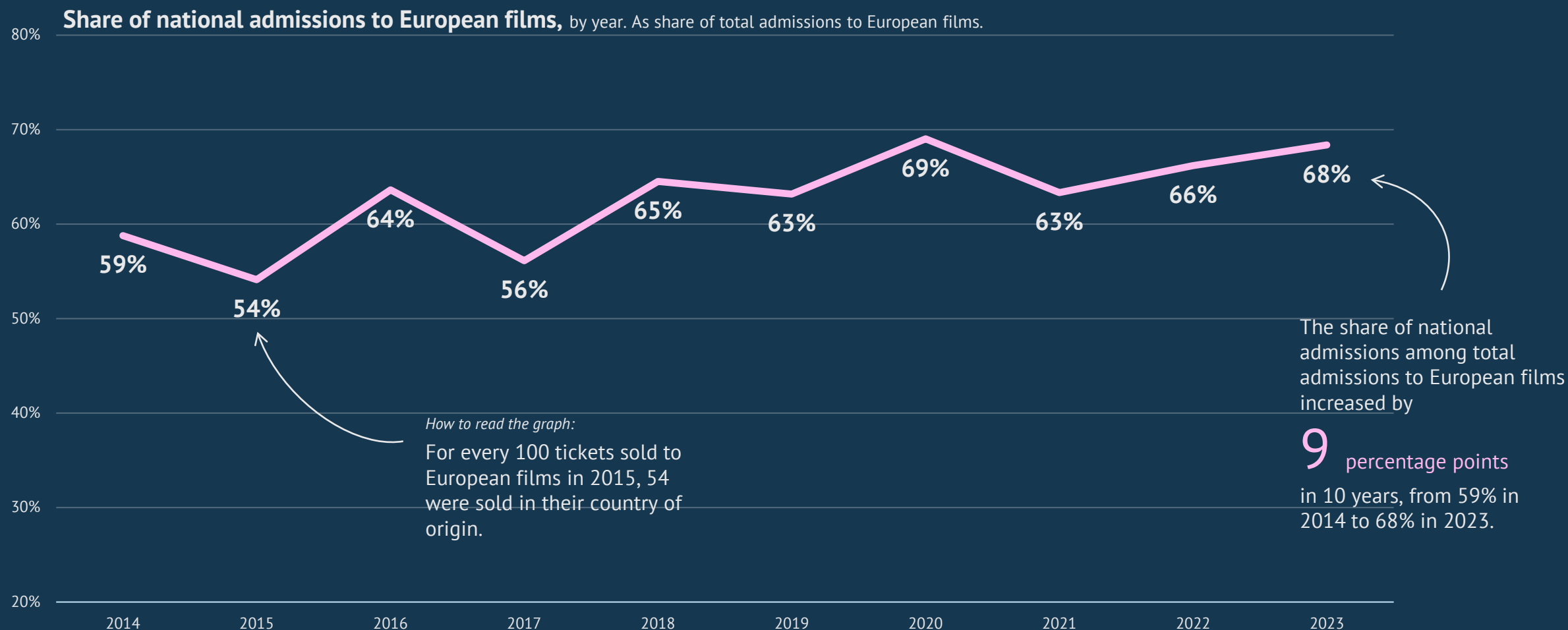
Admissions to European films in 2023 were down 35% compared to the pre-pandemic average.



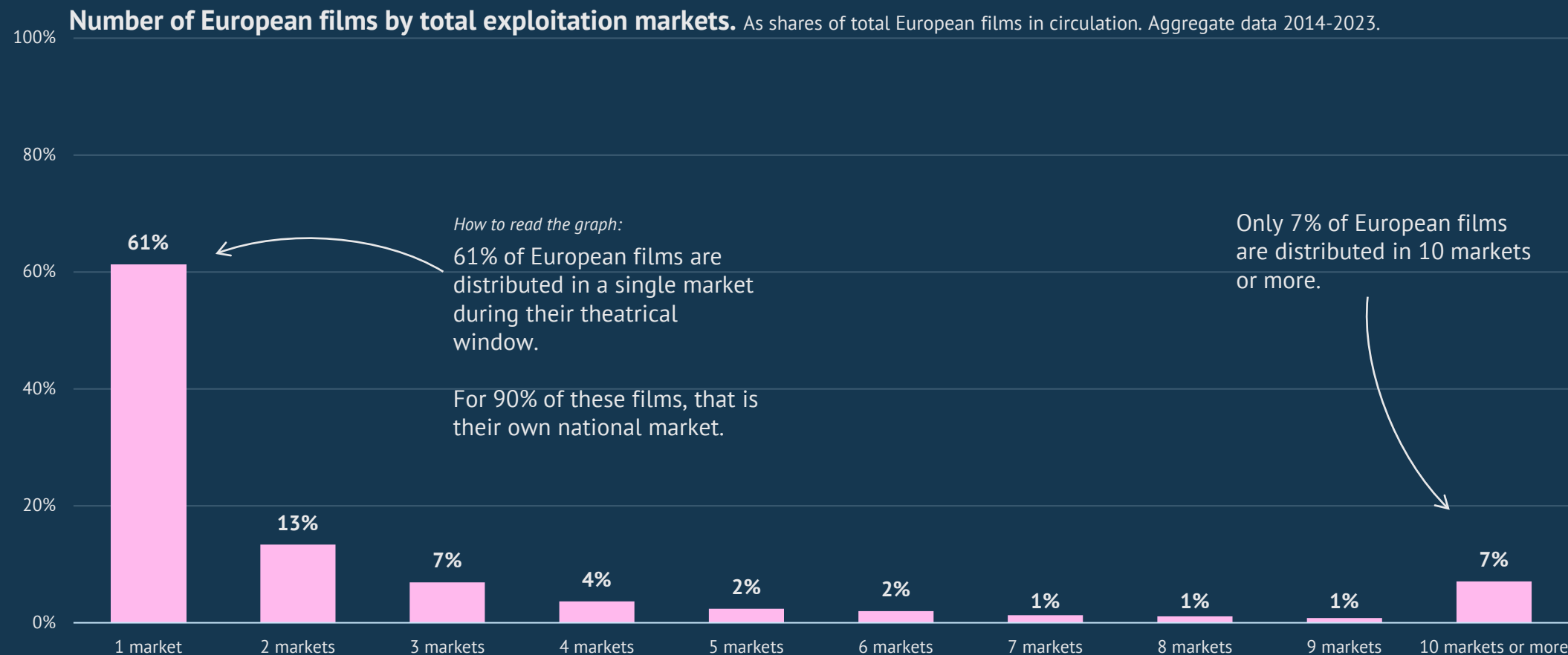
As global theatrical attendance declined significantly post-pandemic, the share of admissions to European films has remained relatively stable, fluctuating between 5% and 10% over the past 10 years.



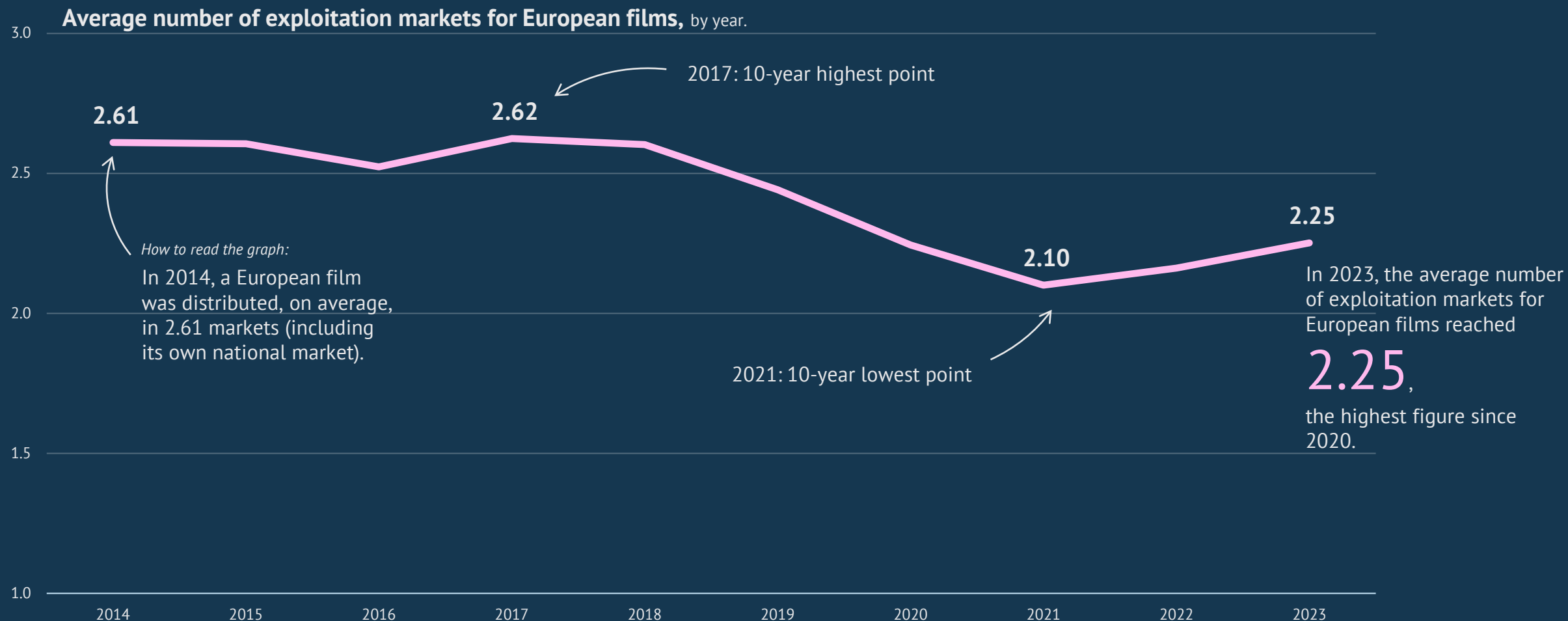
National admissions make up an increasing share of total admissions to European films.



More than half of European films do not have a theatrical distribution outside of their national market.

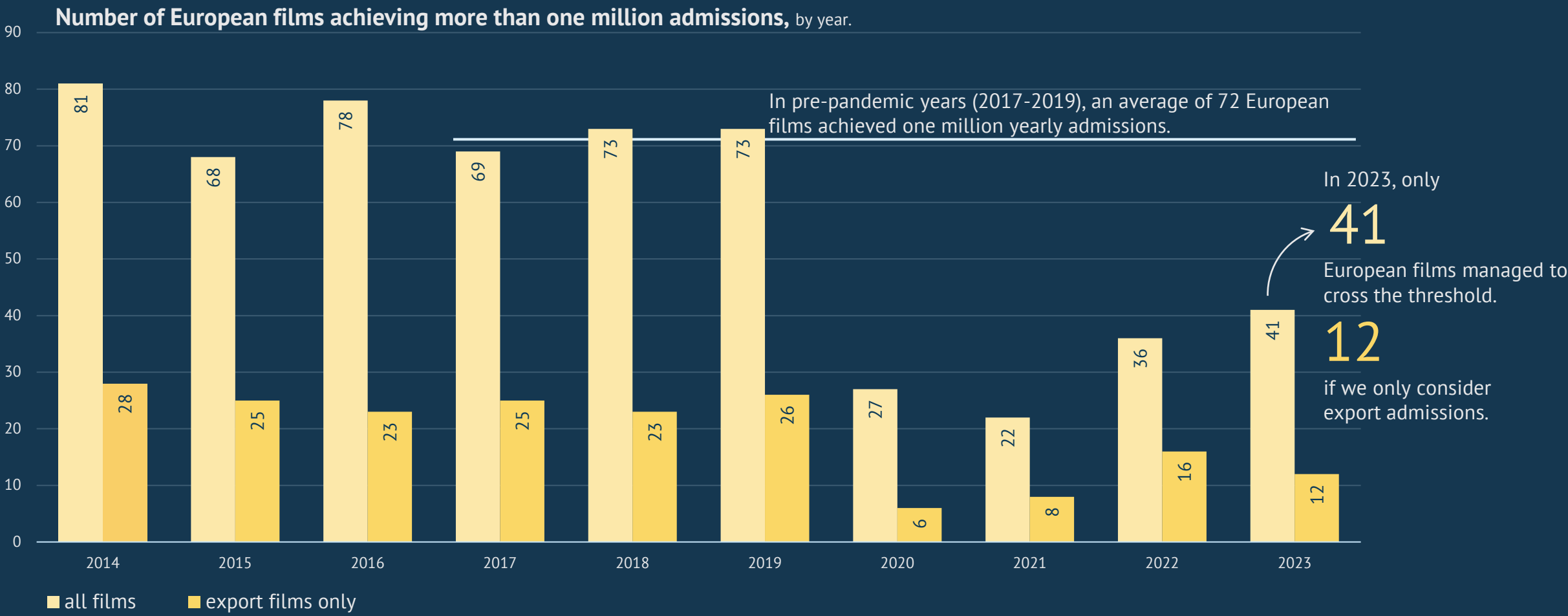


The number of average exploitation markets for European films has slightly decreased over time but has never dropped below two.

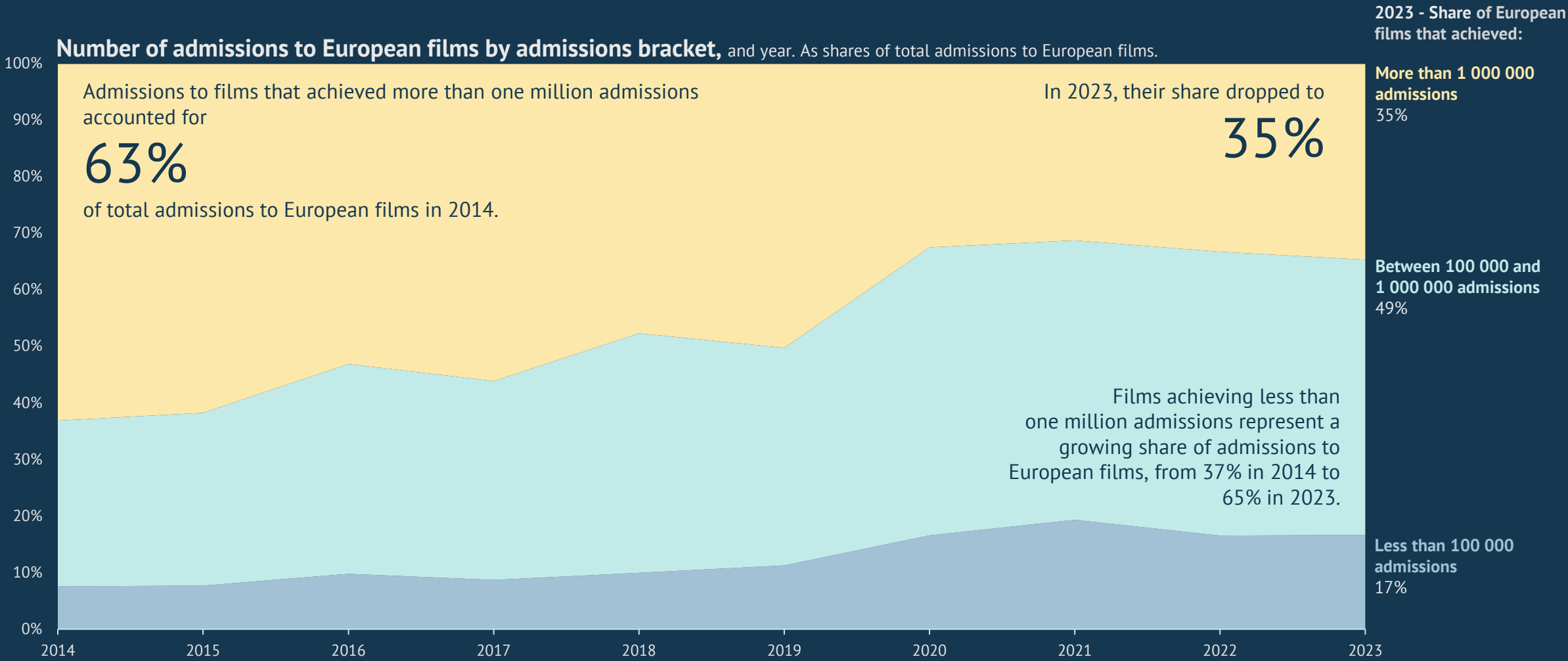


Figures were retrieved from admissions data for 45 markets worldwide. A film is recognised as being distributed in an exploitation market if it reached 1 000 admissions within that market in a given year. To minimize the influence of repertory screenings, only films produced from 2012 onwards were included in the analysis. Source: European Audiovisual Observatory.

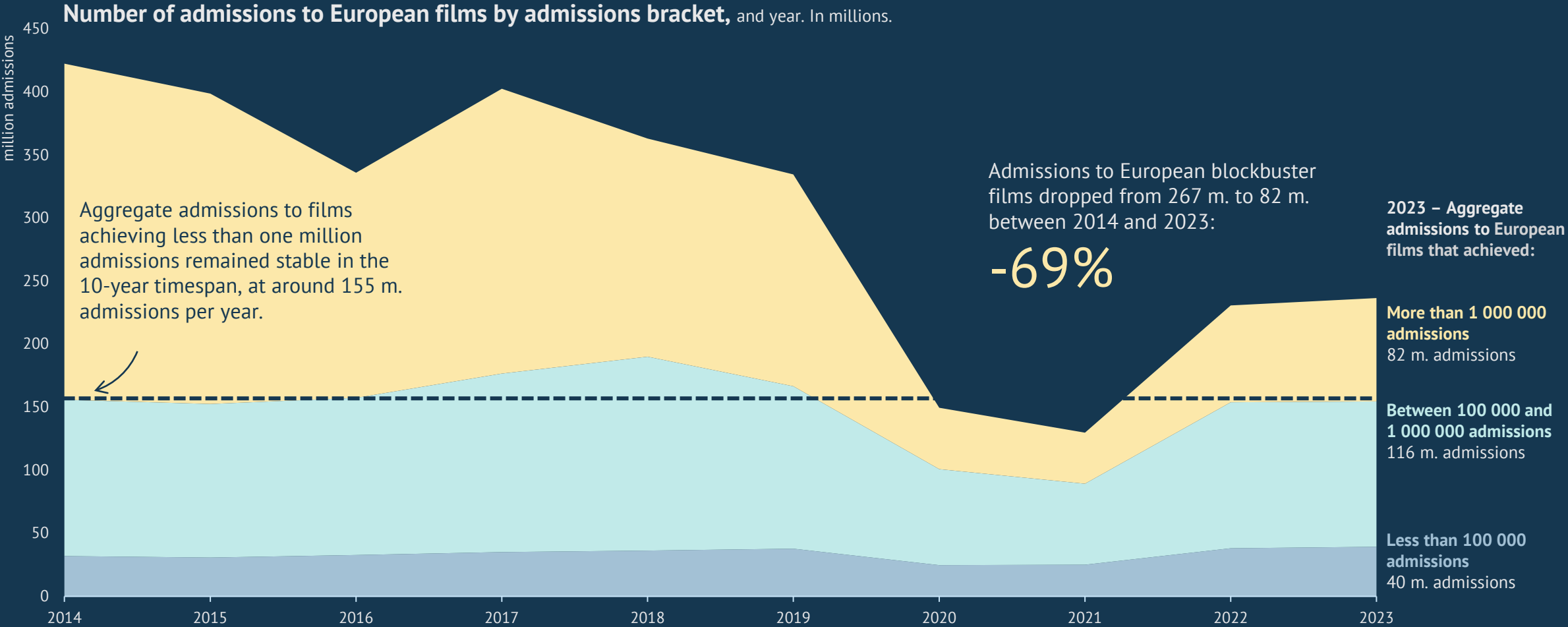
European “blockbusters” are an endangered species: films achieving more than one million admissions are down 43% compared to pre-pandemic years.



The share of admissions of European “blockbusters” almost halved between 2014 and 2023.



European “blockbusters” are the titles most impacted by the decline in admissions, while aggregate results for films with fewer than one million annual admissions have remained stable over time.





03

Markets

Key 2023 figures

92%

Share of admissions to European films sold in Europe
+4 percentage points compared to 2022

68%

Share of admissions to European films sold in their national market
+2 percentage points compared to 2022

23%

Share of admissions to European films sold in Europe,
outside of their national market
+2 percentage points compared to 2022

8%

Share of admissions to European films sold outside of Europe
-4 percentage points compared to 2022

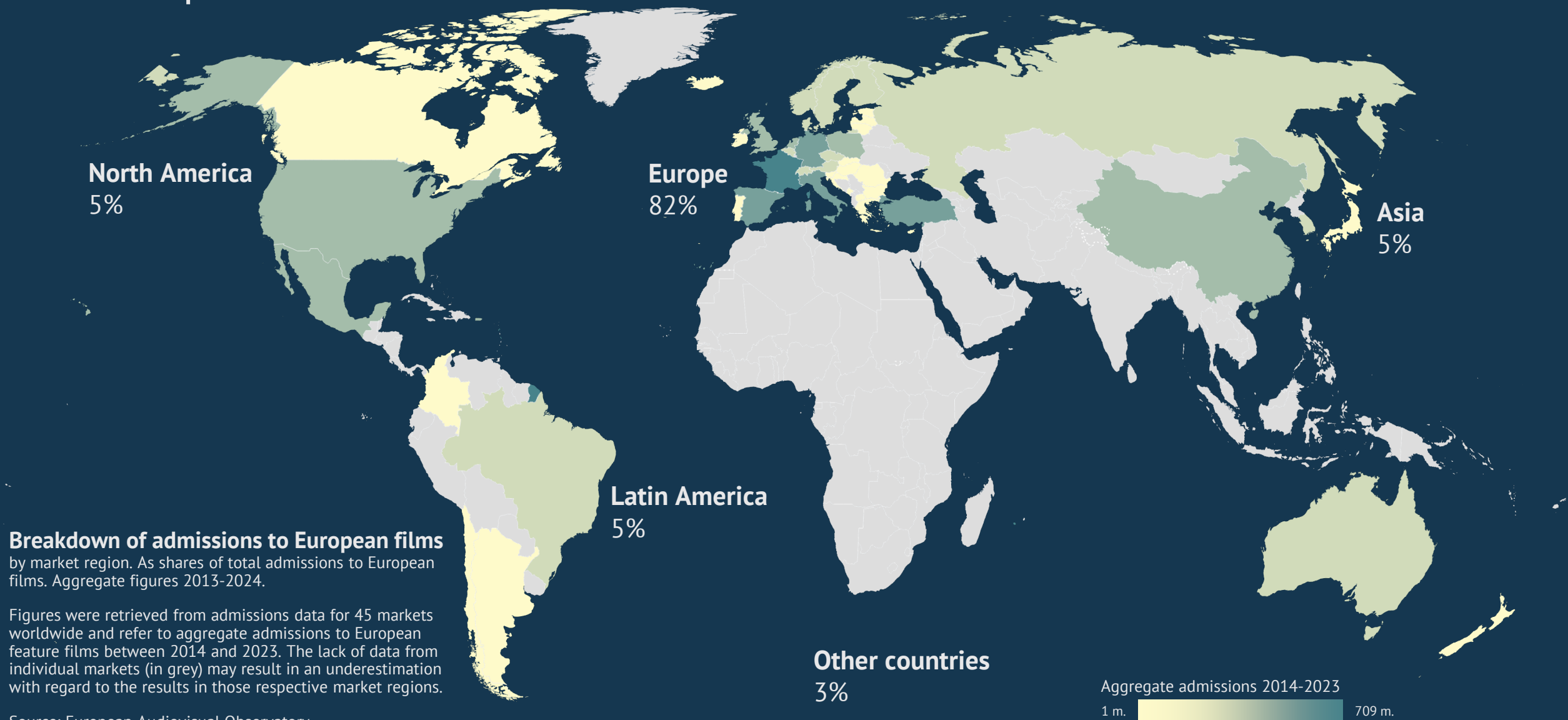
Biggest markets – share of admissions to European films:

1. France	31%
2. Germany	10%
3. Italy	9%

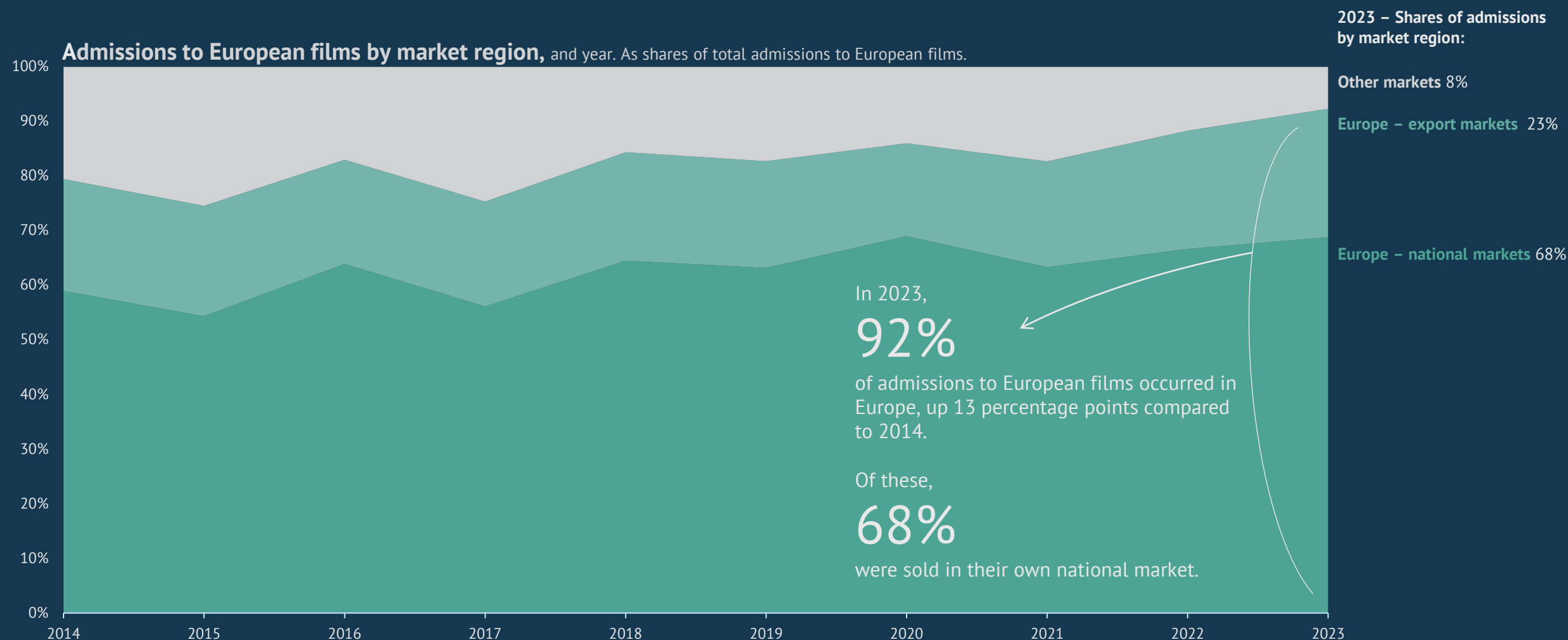
Biggest export markets – share of export admissions to European films:

1. France	11%
2. Germany	10%
3. Poland	9%

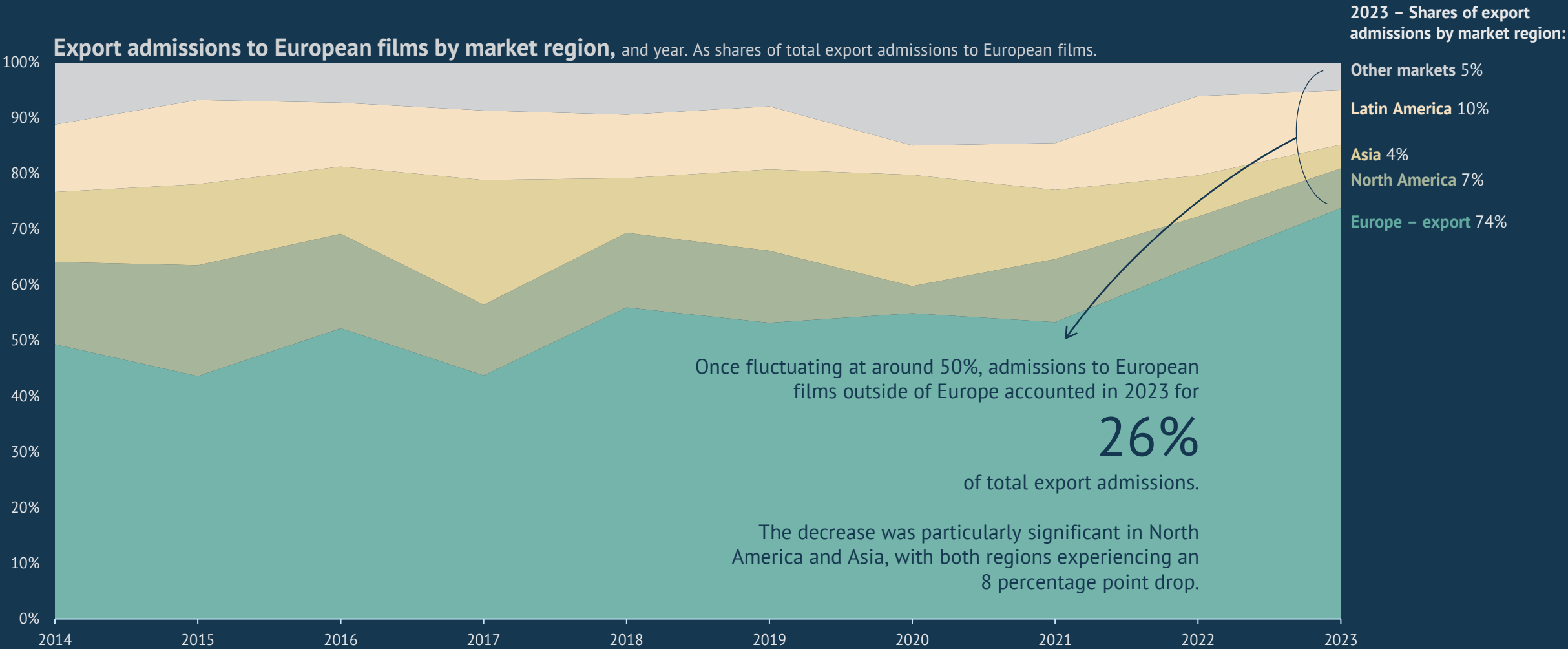
Between 2014 and 2023, Europe itself accounted for 82% of admissions to European films.



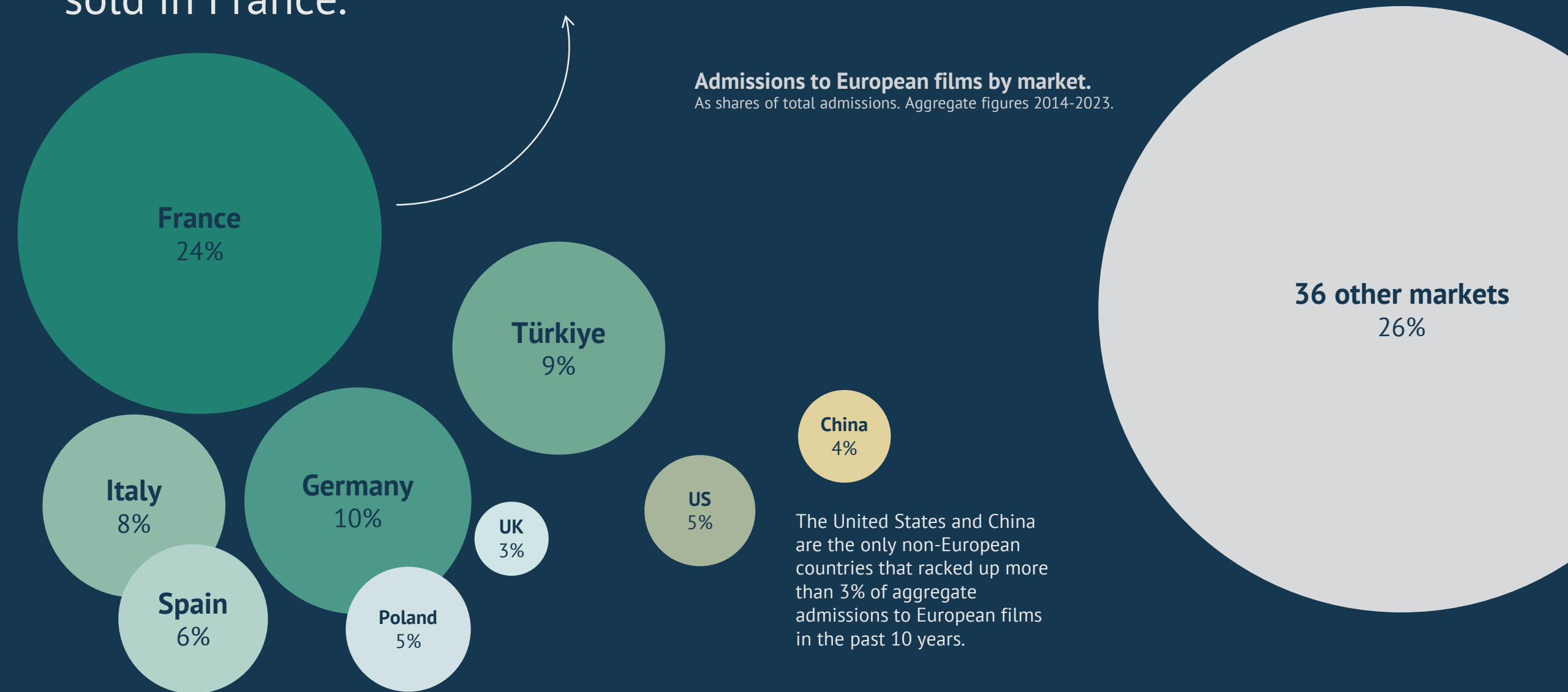
Admissions to European films are increasingly concentrated in national markets and within Europe.



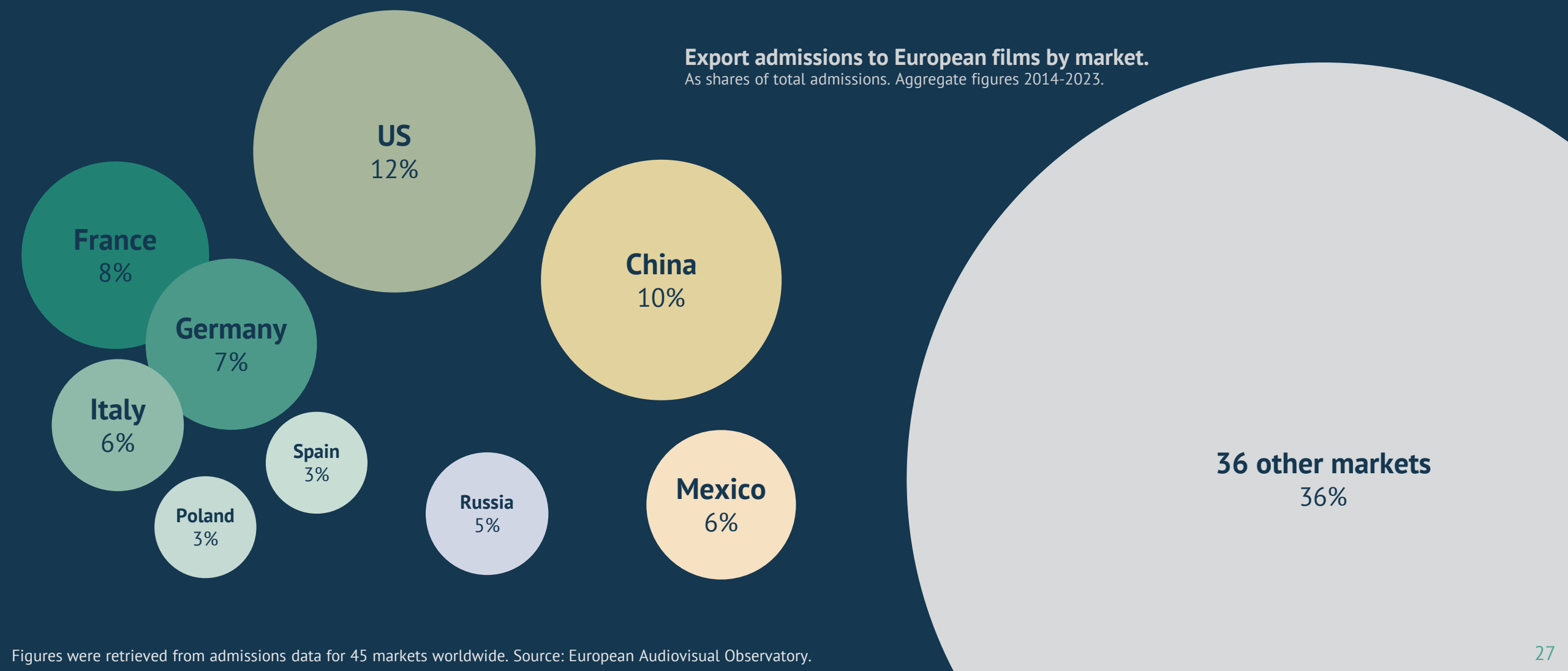
Non-European markets account for an increasingly smaller market share of export admissions to European films.



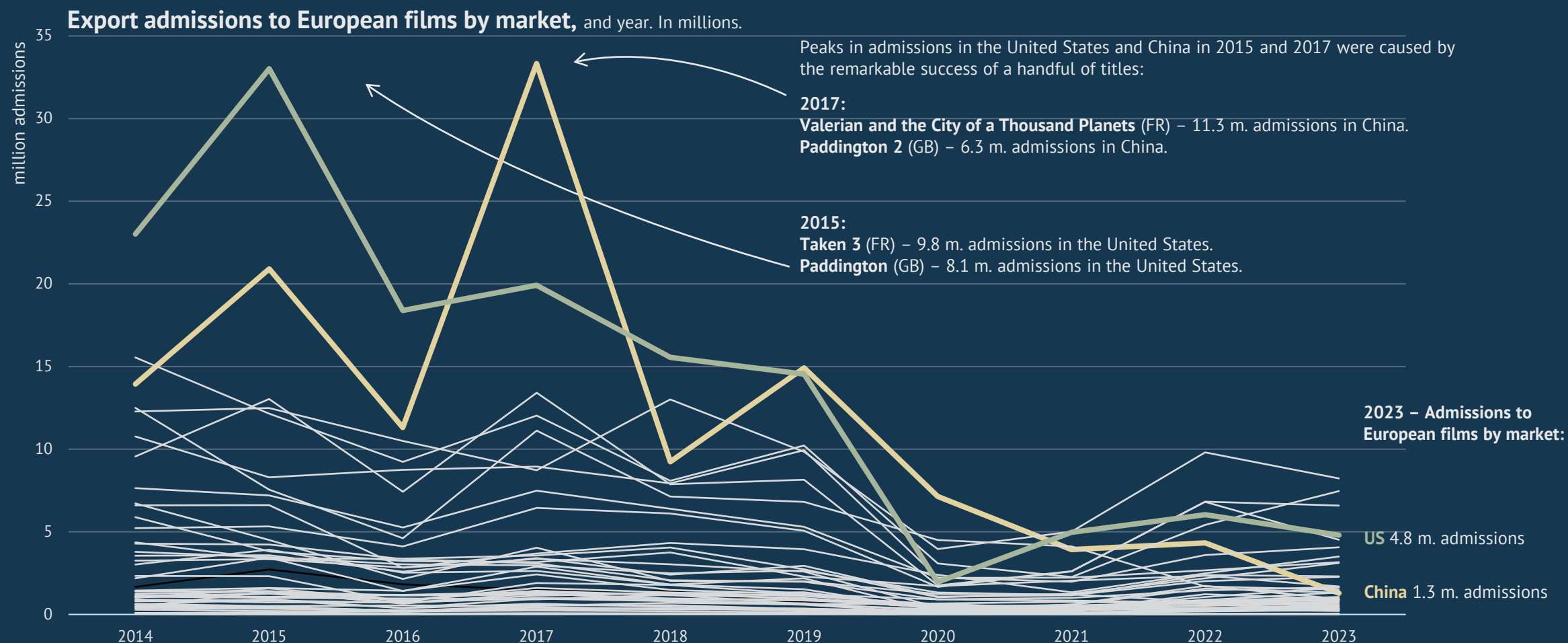
A quarter of all admissions to European films in the past 10 years were sold in France.



Export admissions for European films are more evenly distributed across individual markets, with a lower level of concentration within Europe.



Admissions in China and the United States, once the most important export markets for European films, are plummeting.





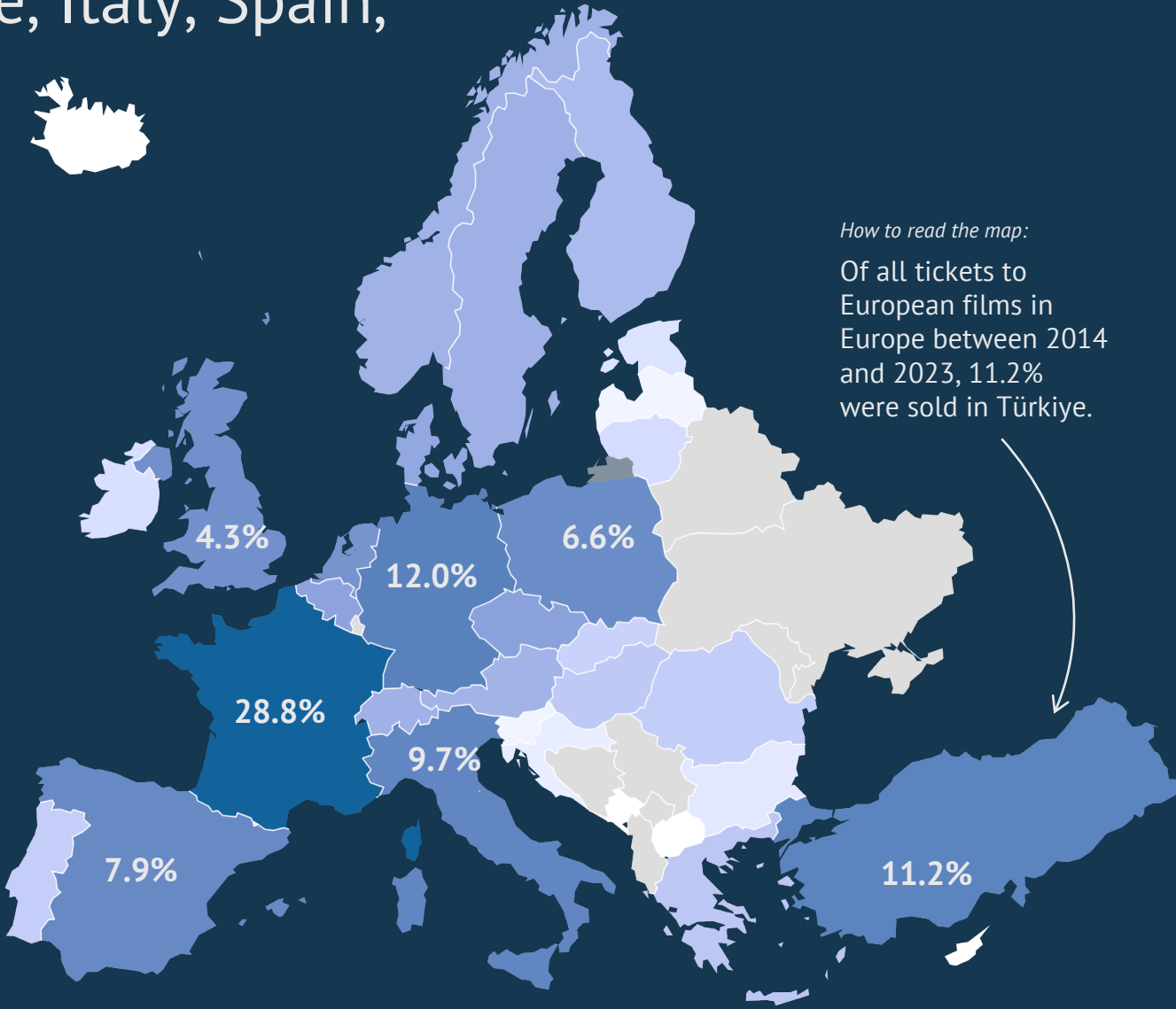
04

Market focus: Europe

More than 75% of admissions to European films in Europe are sold in just 6 markets: France, Germany, Türkiye, Italy, Spain, and Poland.

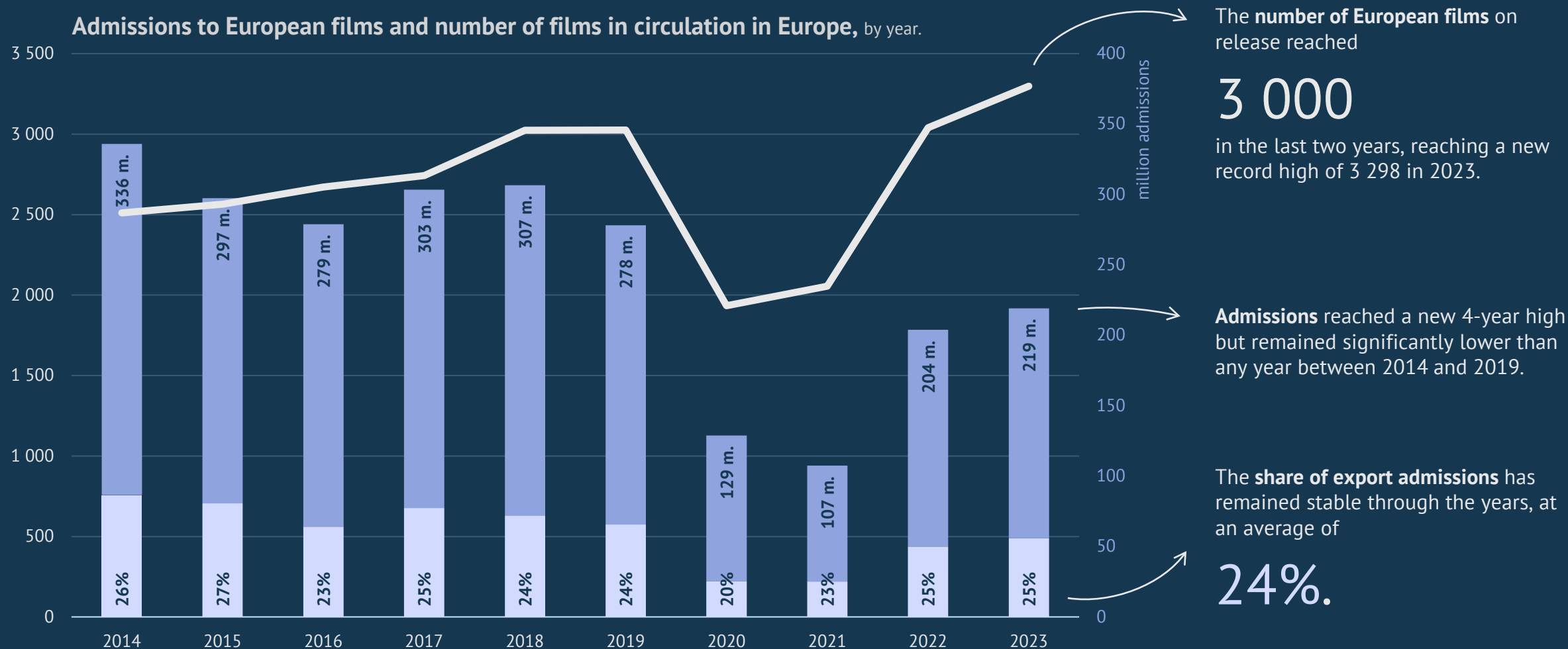
Breakdown of admissions to European films in Europe,
by market. As shares of total admissions to European films. Aggregate figures 2014-2023.

France 28.8%	Czechia 1.8%	Portugal 0.6%	Slovenia 0.2%
Germany 12.0%	Denmark 1.7%	Romania 0.6%	Iceland 0.1%
Türkiye 11.2%	Switzerland 1.3%	Slovakia 0.5%	Cyprus 0.0%
Italy 9.7%	Norway 1.3%	Ireland 0.4%	Montenegro 0.0%
Spain 7.9%	Sweden 1.3%	Lithuania 0.4%	North Macedonia 0.0%
Poland 6.6%	Austria 1.2%	Estonia 0.3%	
United Kingdom 4.3%	Finland 0.9%	Bulgaria 0.2%	
Netherlands 3.1%	Greece 0.7%	Croatia 0.2%	
Belgium 1.8%	Hungary 0.6%	Latvia 0.2%	



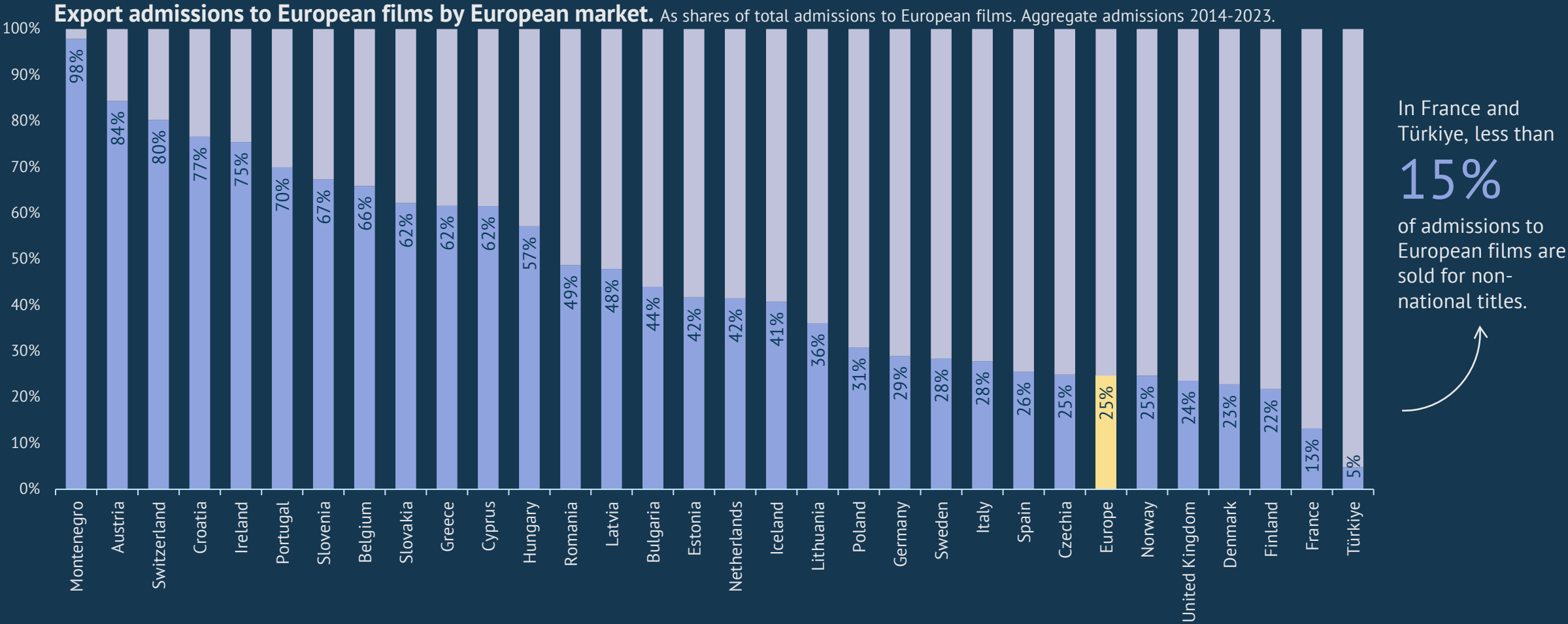
Figures were retrieved from admissions data for 32 European markets and refer to aggregate admissions to European feature films (including local films) between 2014 and 2023. Source: European Audiovisual Observatory.

Total admissions to European films in Europe were down 26% in 2023, compared to pre-pandemic years (2017-2019).

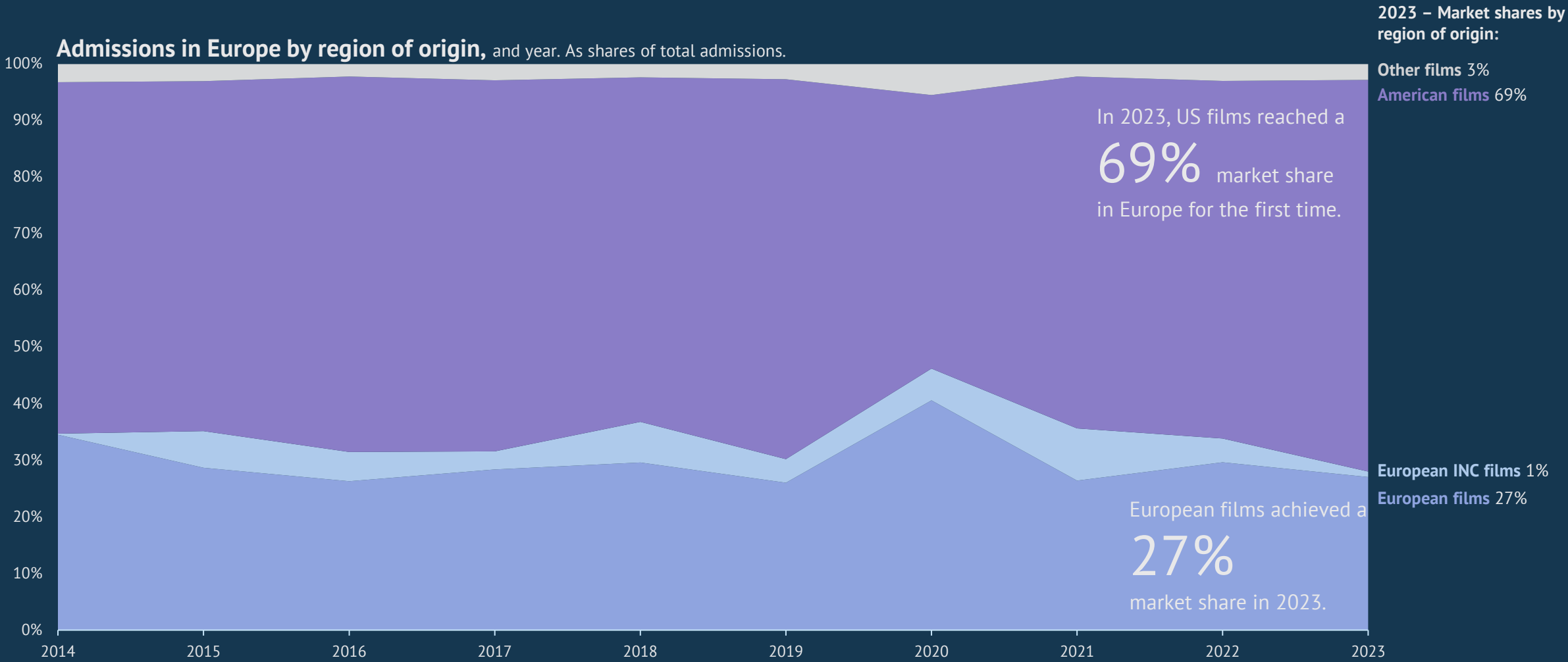


Figures were retrieved from admissions data for 32 markets in Europe. For data on the number of films in circulation, only films that achieved at least 1 000 aggregate admissions were included.
Source: European Audiovisual Observatory.

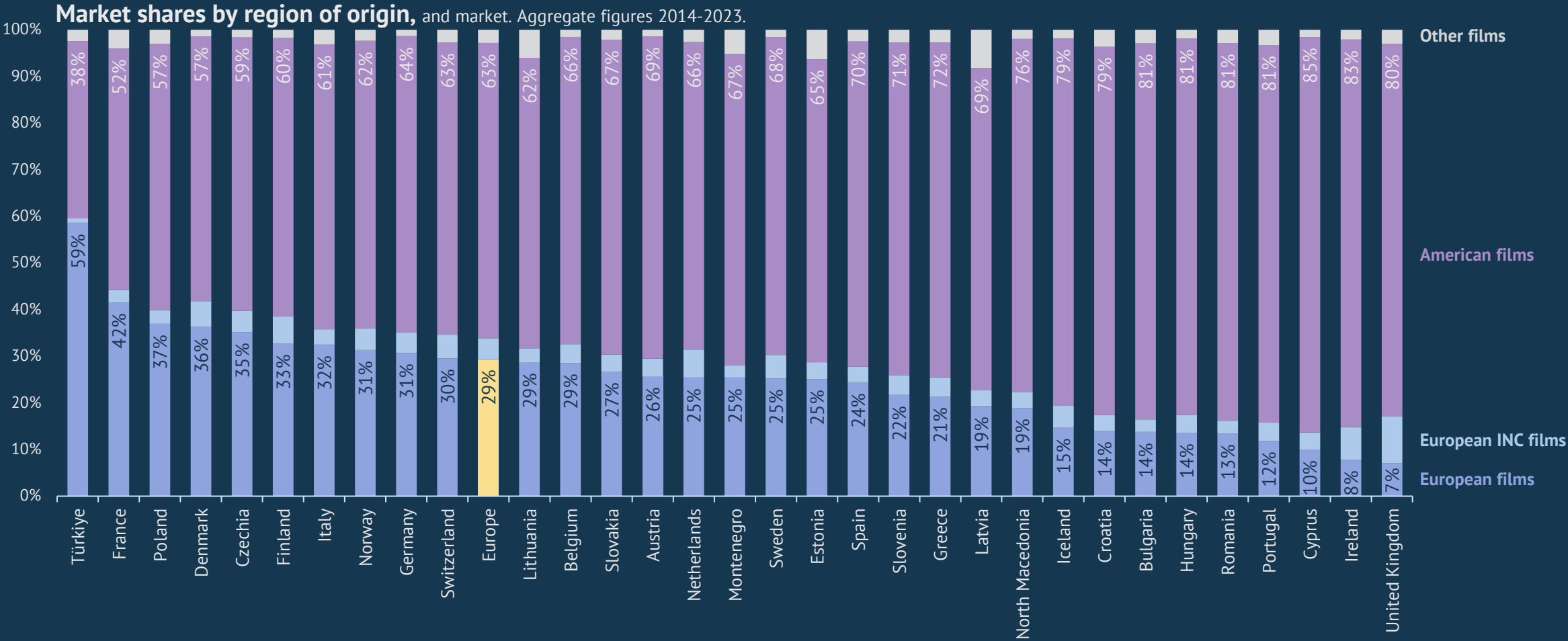
In Europe, only 25% of tickets for European films are sold in countries other than the film's country of origin.



The market share of European films in Europe has fluctuated slightly below 30% over the past 10 years.



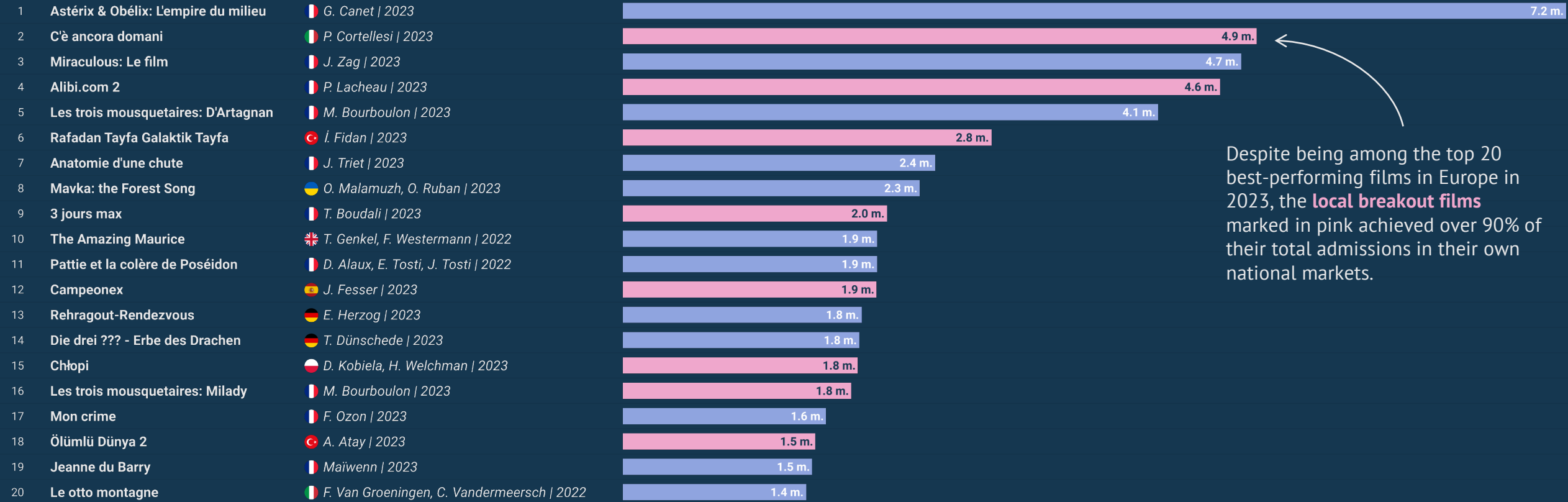
Market shares for European films vary significantly across individual European markets, ranging from 7% in the United Kingdom to 59% in Türkiye, driven by the popularity of local films.



Figures were retrieved from admissions data for 32 markets in Europe. The market share of European films in the United Kingdom differs significantly from the data reported by the British Film Institute, due to the exclusion of incoming productions (“studio-backed” films that qualify as British under the cultural test for film) from this analysis. Source: European Audiovisual Observatory.

Local breakout films and family films make up the majority of the European top films in 2023.

Top 20 European films, ranked by 2023 total admissions in 36 markets in Europe.



Figures were retrieved from admissions data for 36 markets in Europe. Only the first country of origin is disclosed. Local breakout films are defined as films that achieved at least 90% of admissions in their national market. Source: European Audiovisual Observatory.



05

Production countries

Key 2023 figures

Number of European films in circulation by country of origin:

1. French films	819 (24%)	+56 compared to 2022
2. German films	355 (11%)	+27 compared to 2022
3. Italian films	350 (10%)	+22 compared to 2022

Number of admissions by country of origin:

1. French films	89 m. (37%)	+19 m. compared to 2022
2. German films	24 m. (1%)	-5 m. compared to 2022
3. Italian films	23 m. (9%)	+11 m. compared to 2022

Number of European export films in circulation by country of origin:

1. French films	429 (26%)	+55 compared to 2022
2. British films	180 (11%)	+0 compared to 2022
3. German films	157 (10%)	+11 compared to 2022

Number of export admissions by country of origin

1. French films	24 m. (32%)	+8 m. compared to 2022
2. British films	15 m. (19%)	-7 m. compared to 2022
3. German films	7 m. (9%)	-4 m. compared to 2022

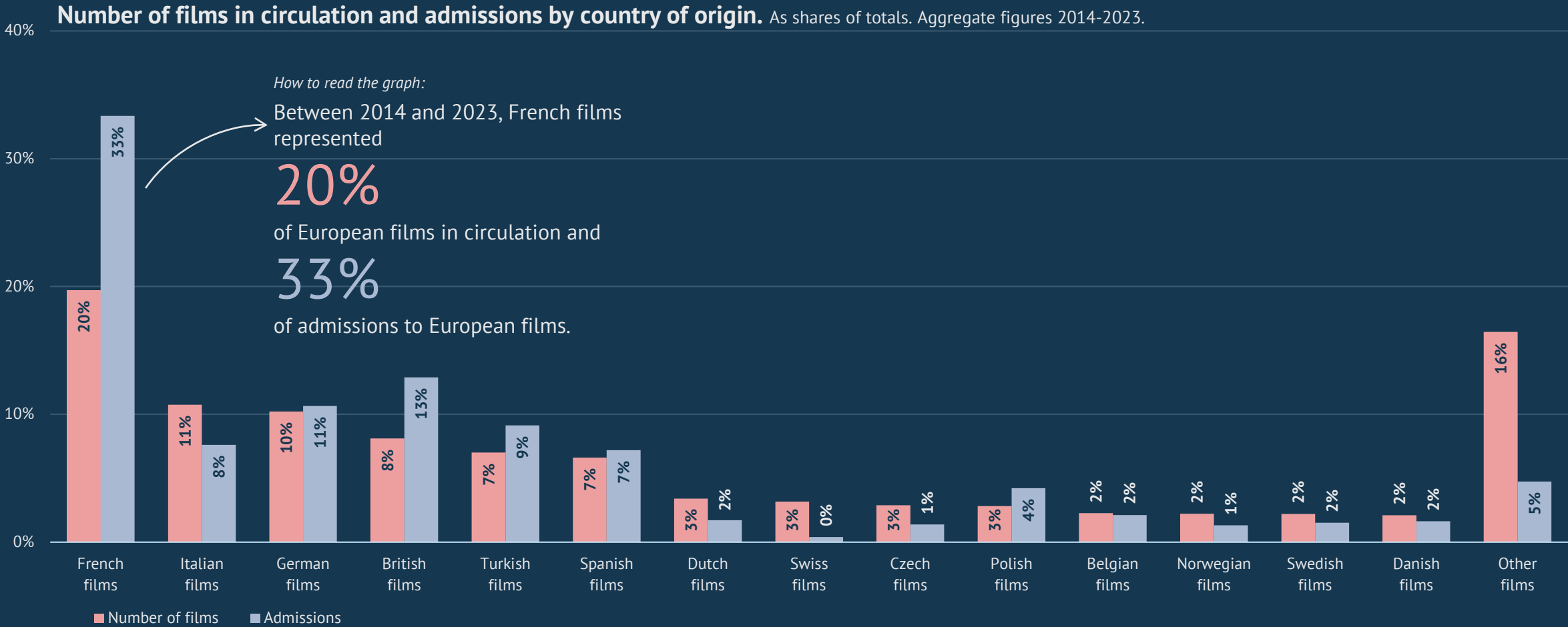
Share of export admissions by country of origin:

1. Irish films	92%
2. British films	77%
3. Belgian films	64%

Average number of exploitation markets by country of origin:

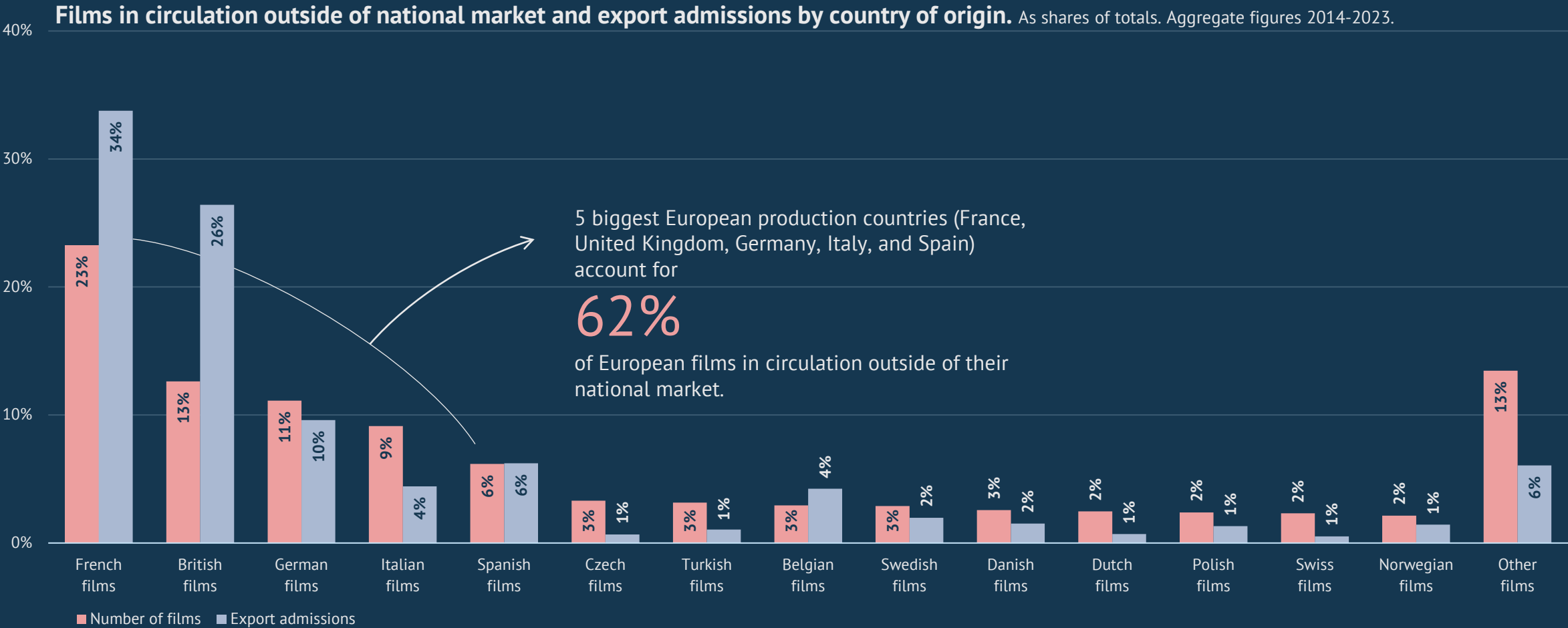
1. Irish films	3.4
2. British films	3.0
3. Norwegian films	2.7

Over the past decade, French films have accounted for one third of all tickets sold for European films worldwide.



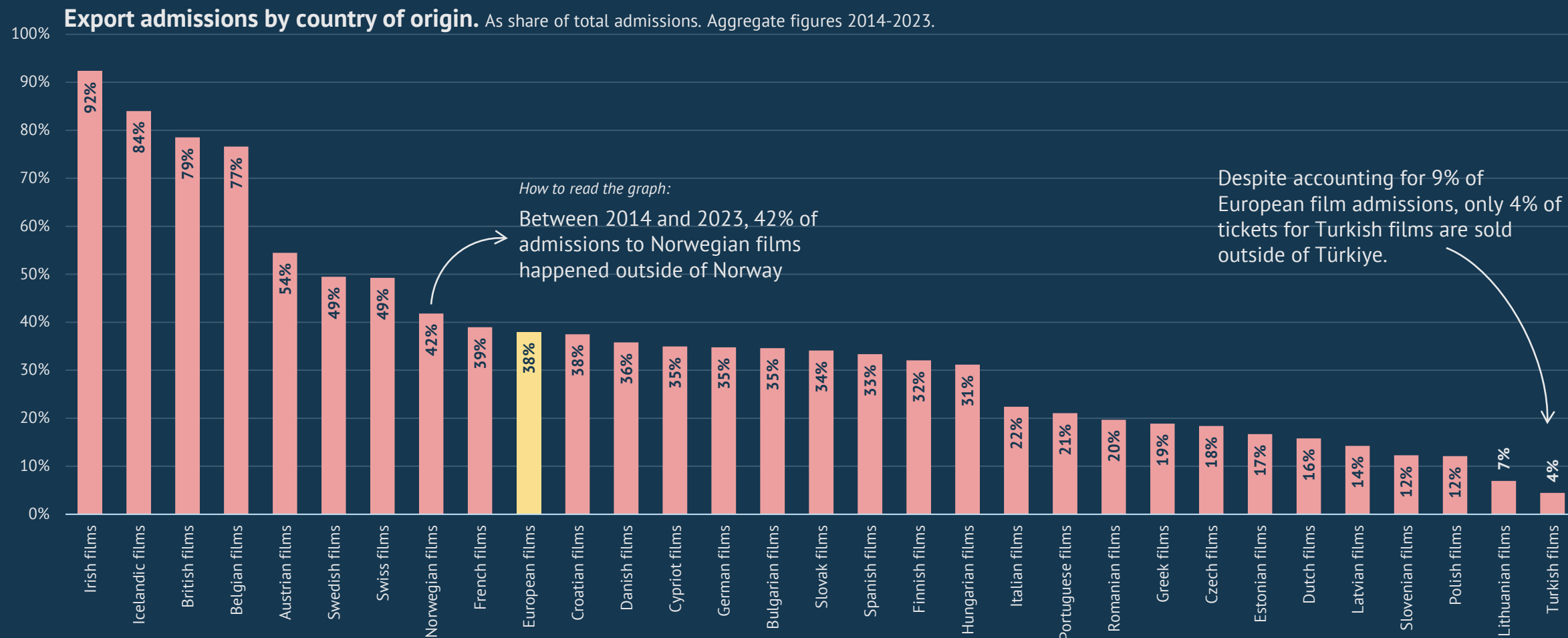
Figures were retrieved from admissions data for 45 markets worldwide. For data on the number of films in circulation, only films that achieved at least 1 000 aggregate admissions were included.
Source: European Audiovisual Observatory.

If we exclude national markets, French and British films alone account for more than 60% of all export admissions to European films.

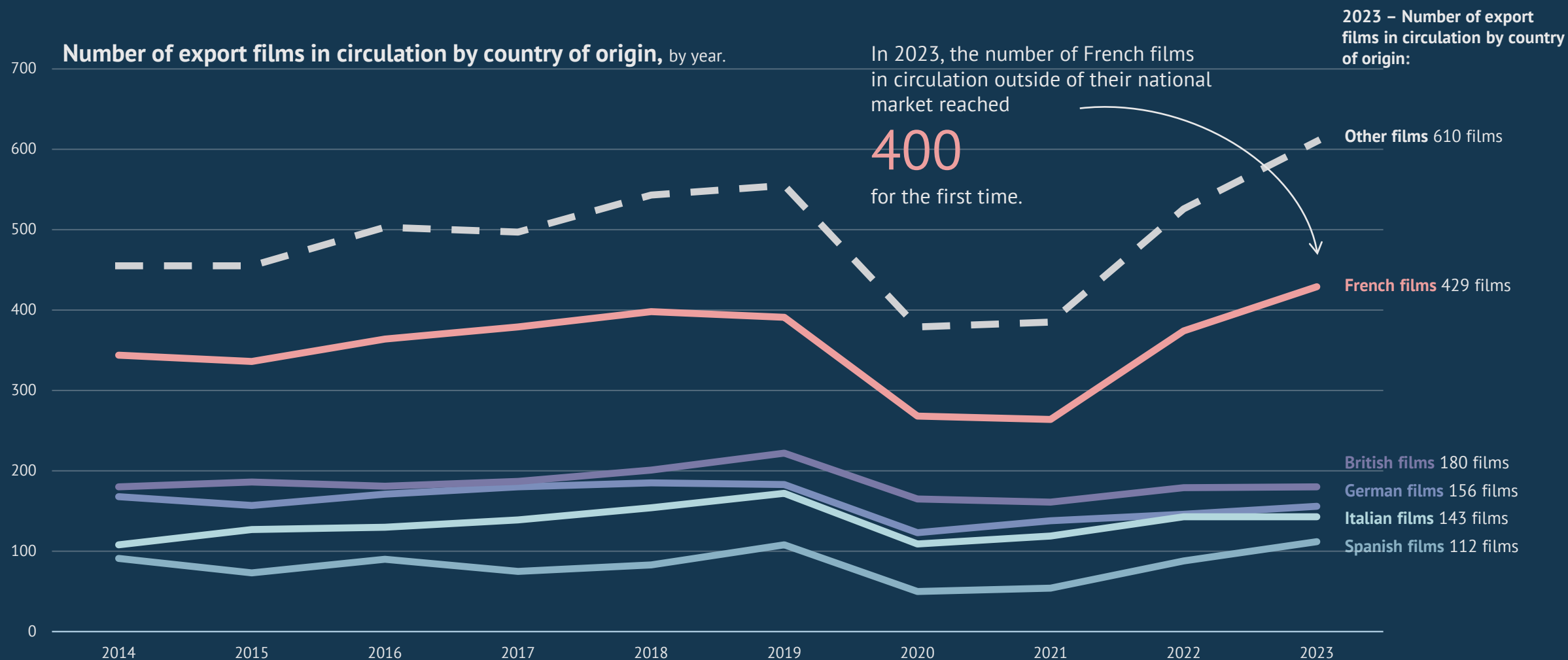


Figures were retrieved from admissions data for 45 markets worldwide. For data on the number of films in circulation, only films that achieved at least 1 000 aggregate export admissions were included. Source: European Audiovisual Observatory.

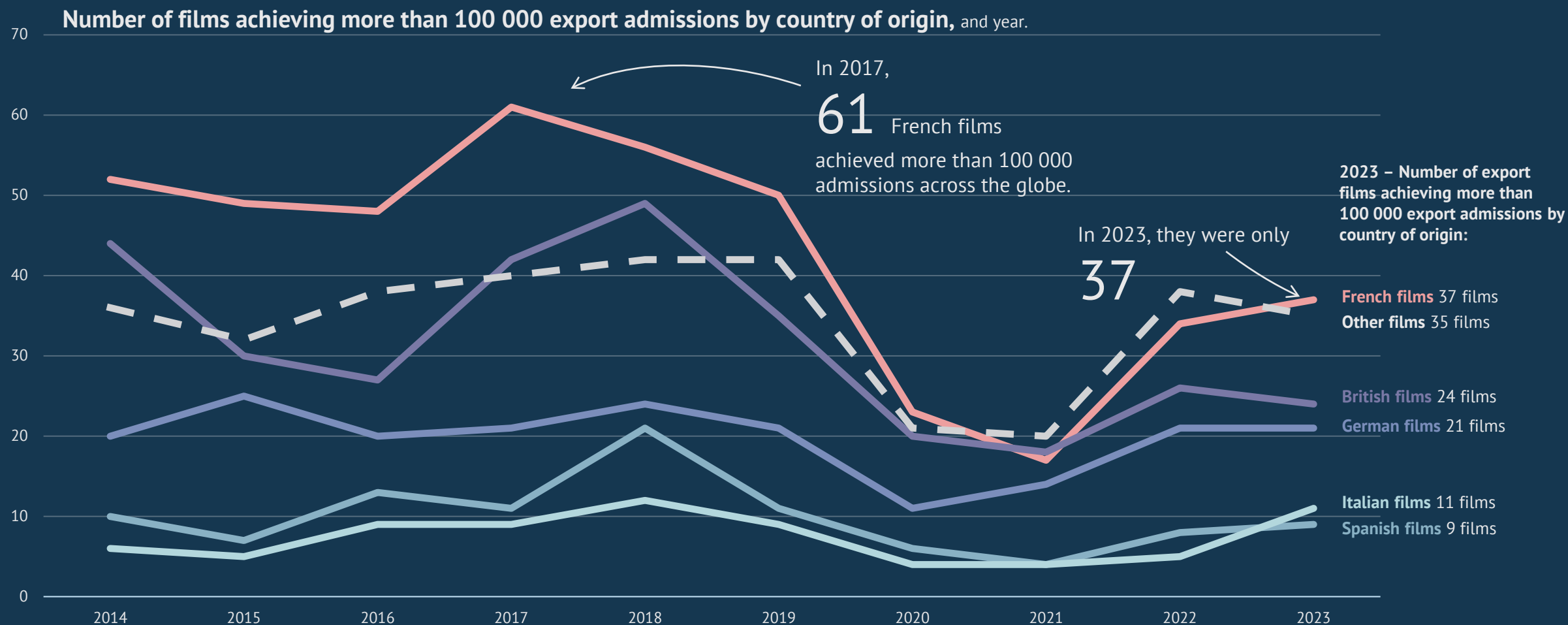
Only films from Ireland, Iceland, the United Kingdom, Belgium, and Austria sell more than half of their tickets outside their home countries.



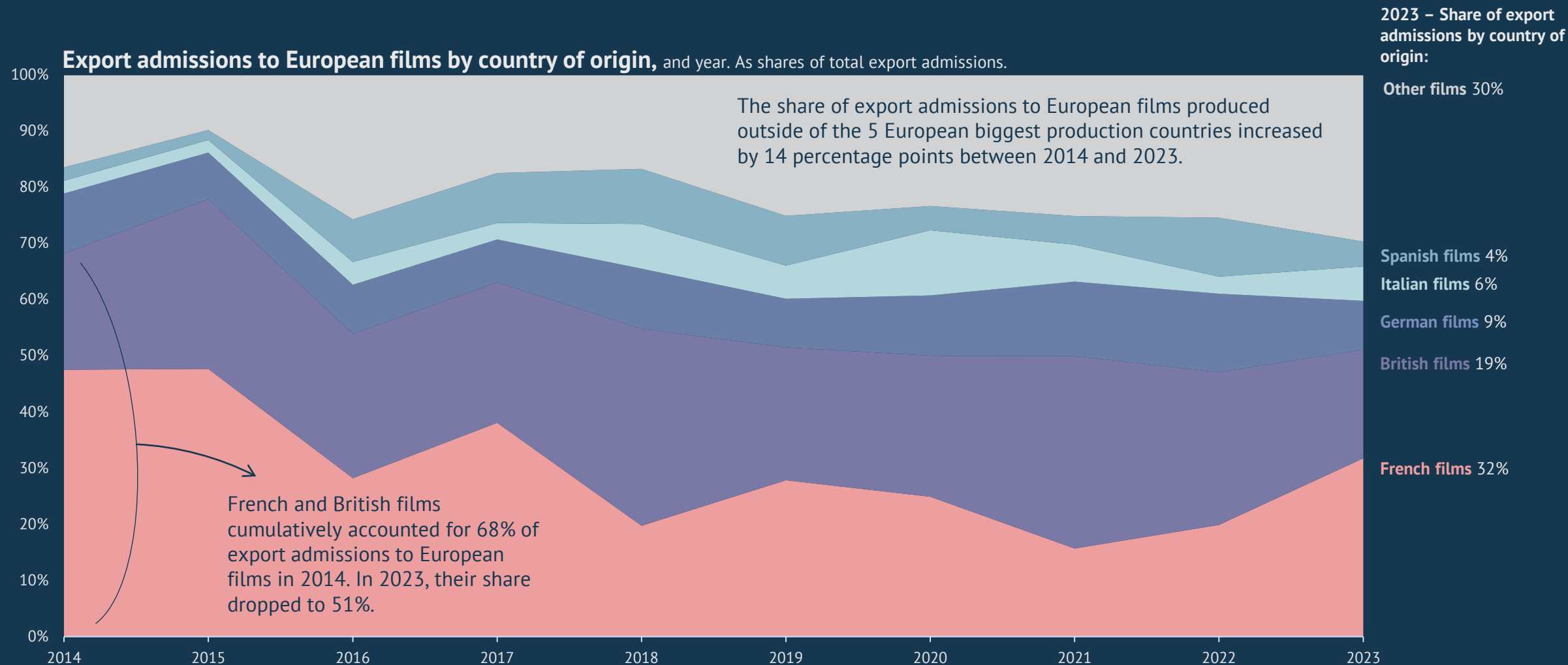
The number of French films exported is significantly higher than that of any other European country.



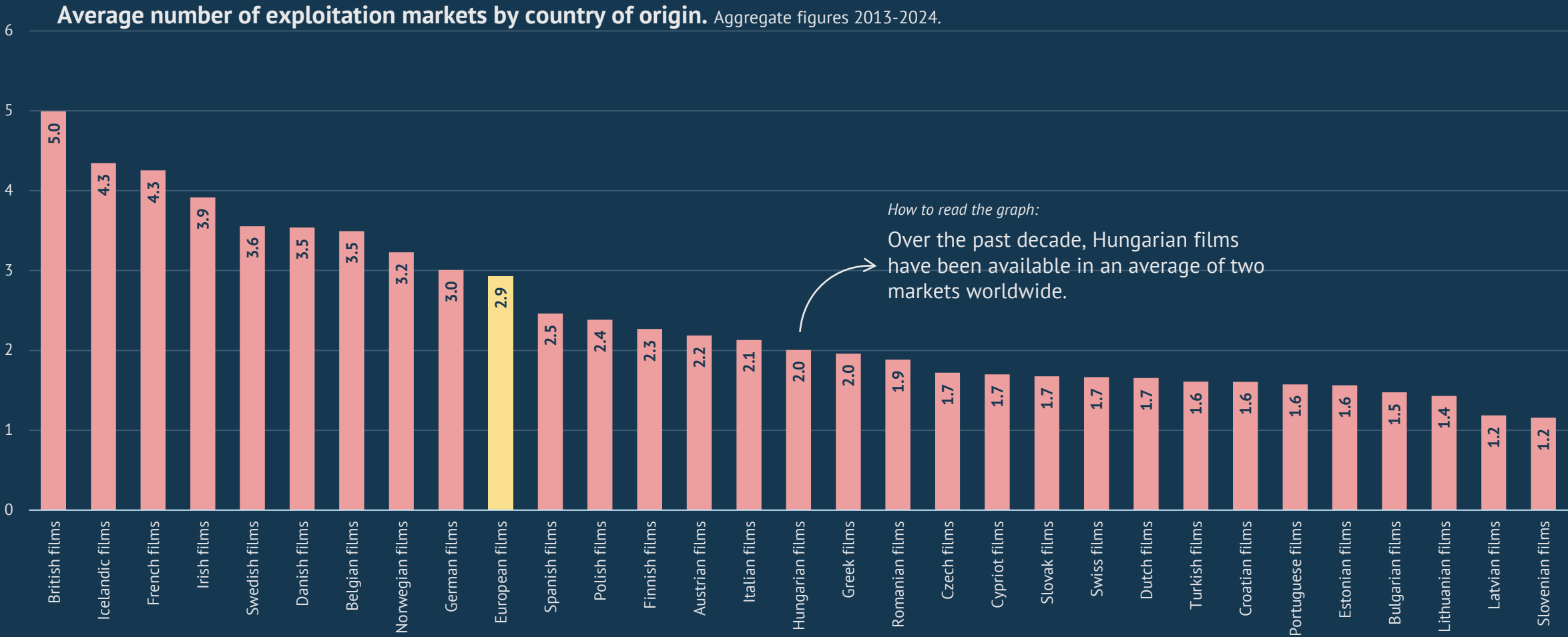
Despite their leading position, the number of French and British films achieving more than 100 000 export admissions per year is shrinking over time...



...causing the share of export admissions for British and French films to decrease significantly over the past 10 years.



British films are the most widely distributed among European films; they are available in cinemas in an average of five markets over their theatrical run, including their domestic one.

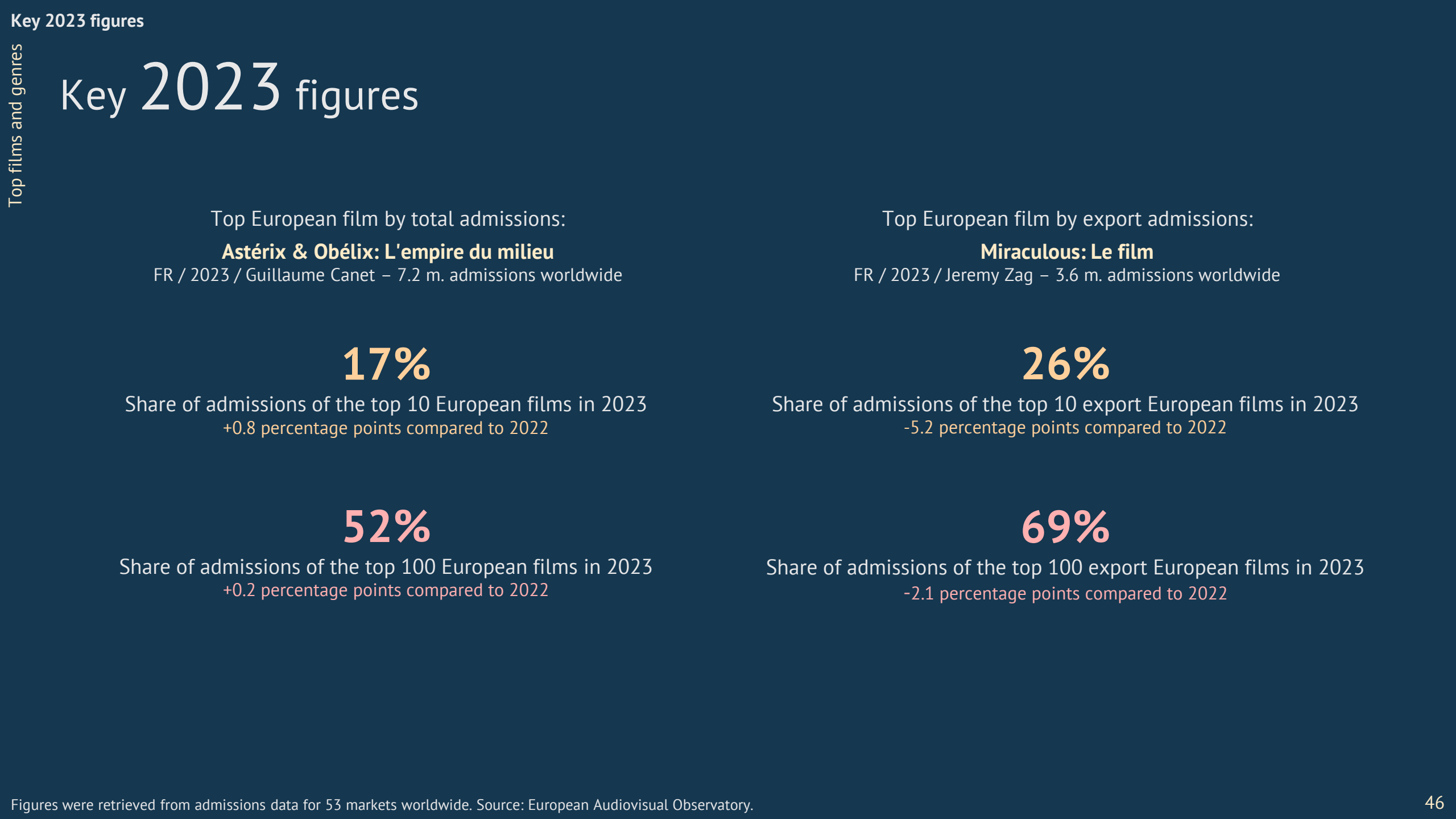


Figures were retrieved from admissions data for 45 markets worldwide. A film is recognised as being distributed in an exploitation market if it reached 1 000 admissions within that market between 2014 and 2023. Source: European Audiovisual Observatory.

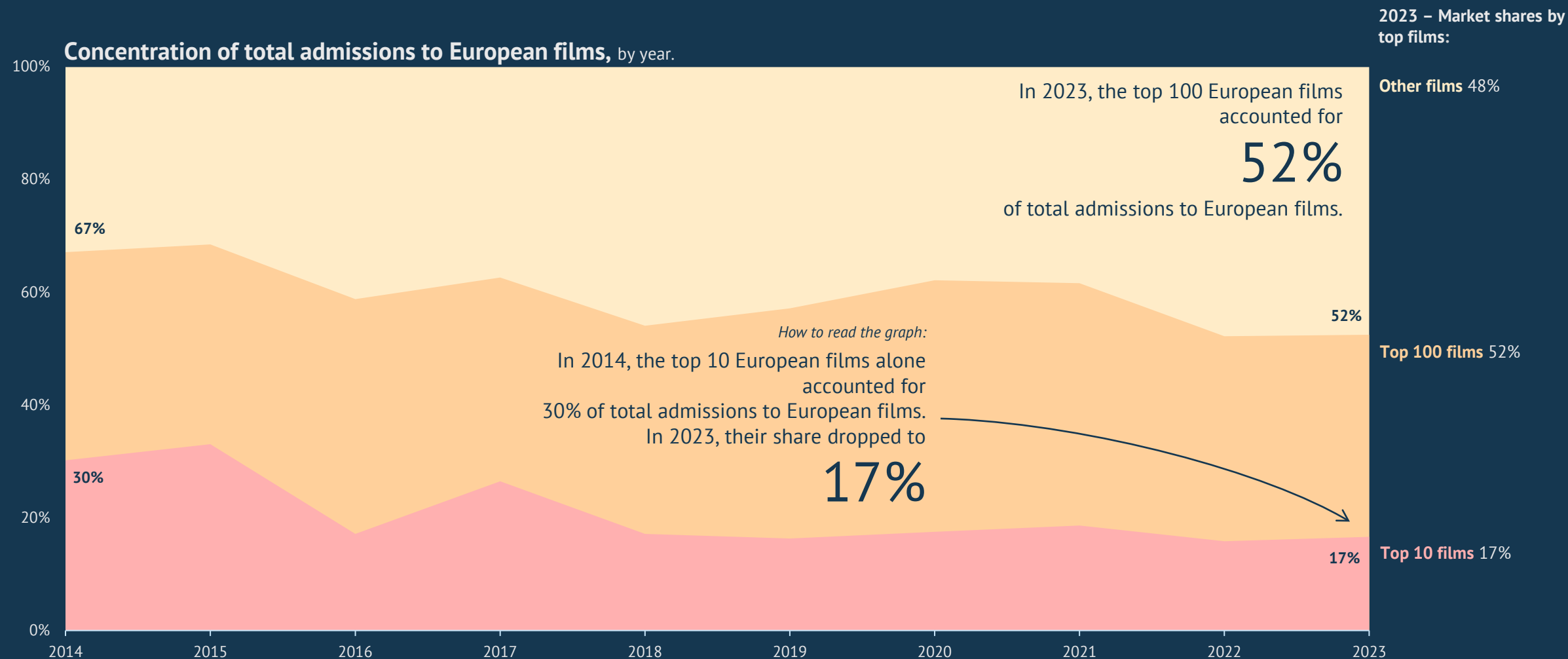


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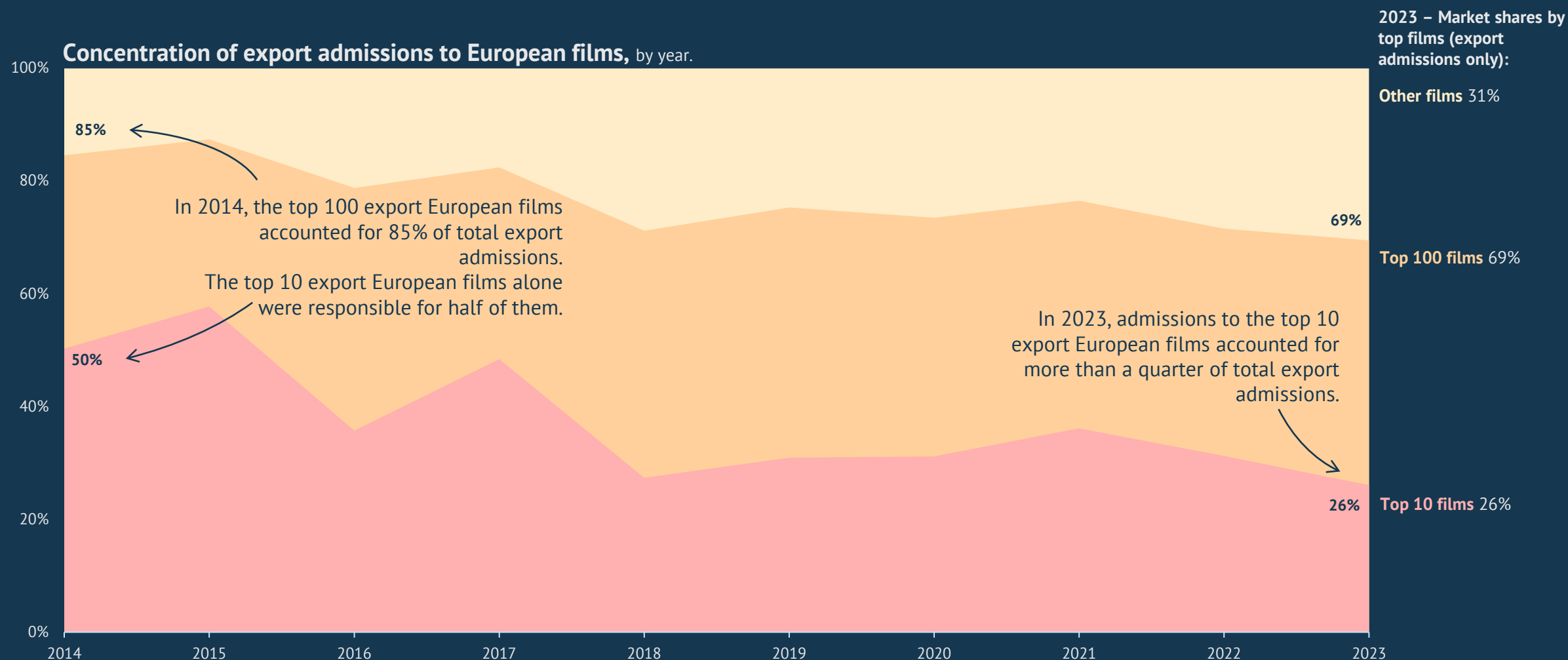
Top films and genres



The concentration of admissions to European films is decreasing, with the top 100 films now representing little more than half of total admissions.

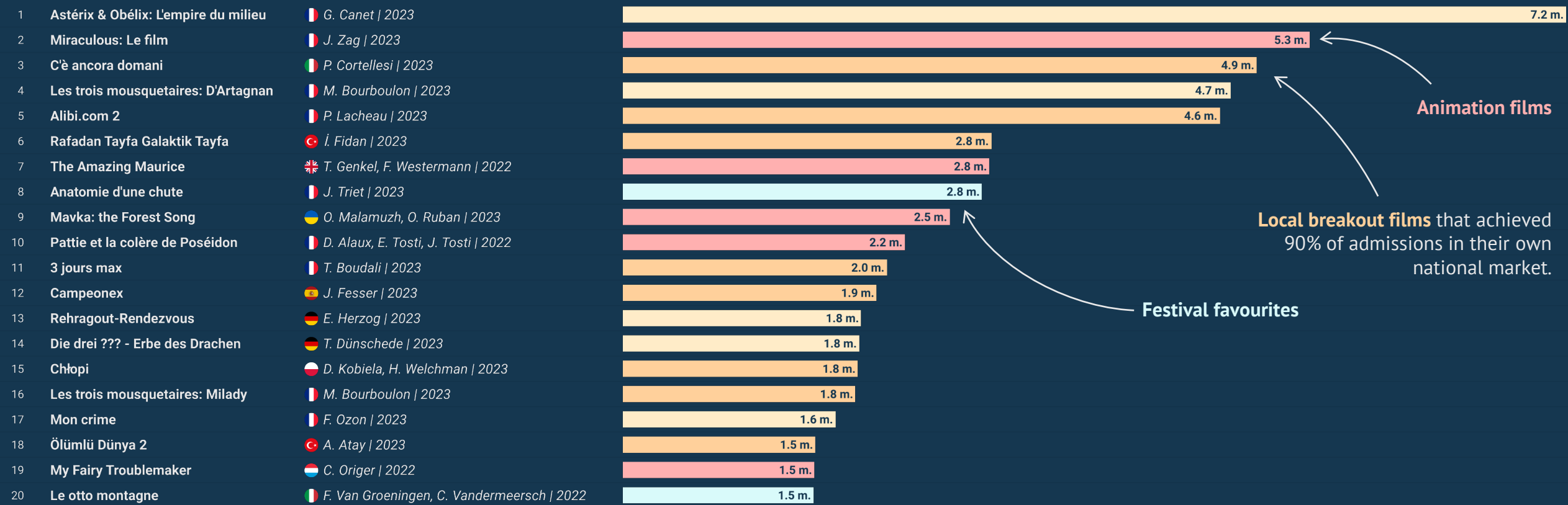


The same trend holds when considering only export admissions, although the concentration is still comparatively higher.



6 of the top 10 European films in 2023 were French productions.

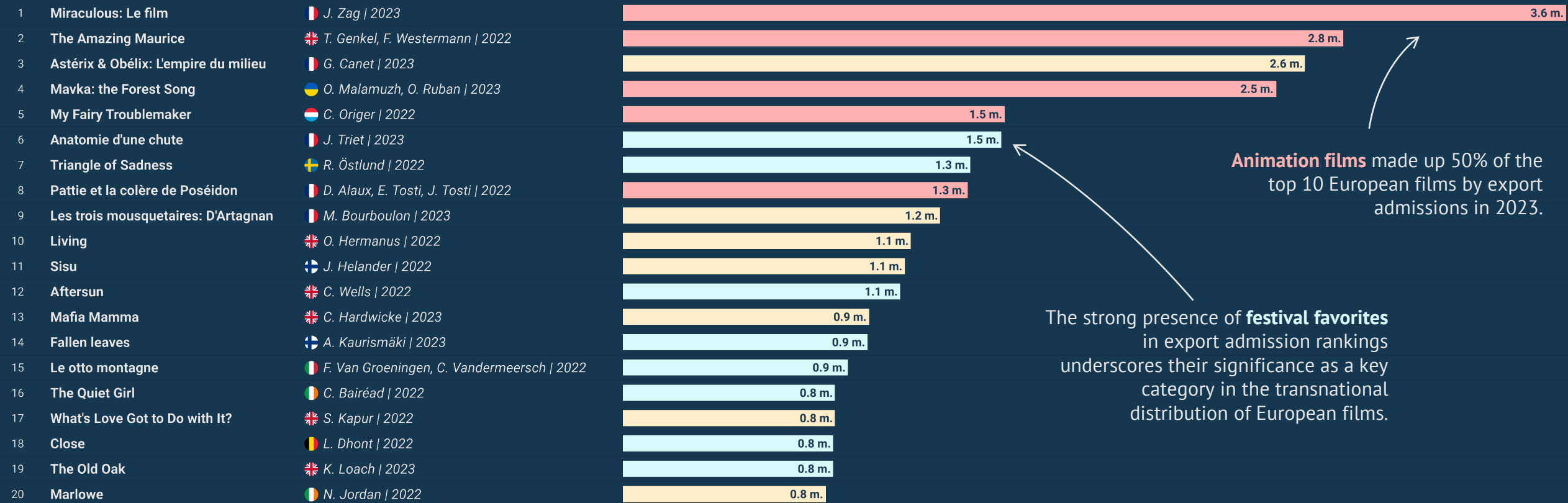
Top 20 European films in 2023, by total admissions. Ranked by 2023 admissions in 53 markets worldwide.



Figures were retrieved from admissions data for 53 markets worldwide. Only the first country of origin is disclosed. Local breakout films are defined as films that achieved at least 90% of admissions in their national market. Festival favorites are defined as European films that had their premiere in a competition section at a major film festival. Source: European Audiovisual Observatory.

If we only consider export admissions, animation films represented half of the top 10 European films in 2023, and the top 2 spots.

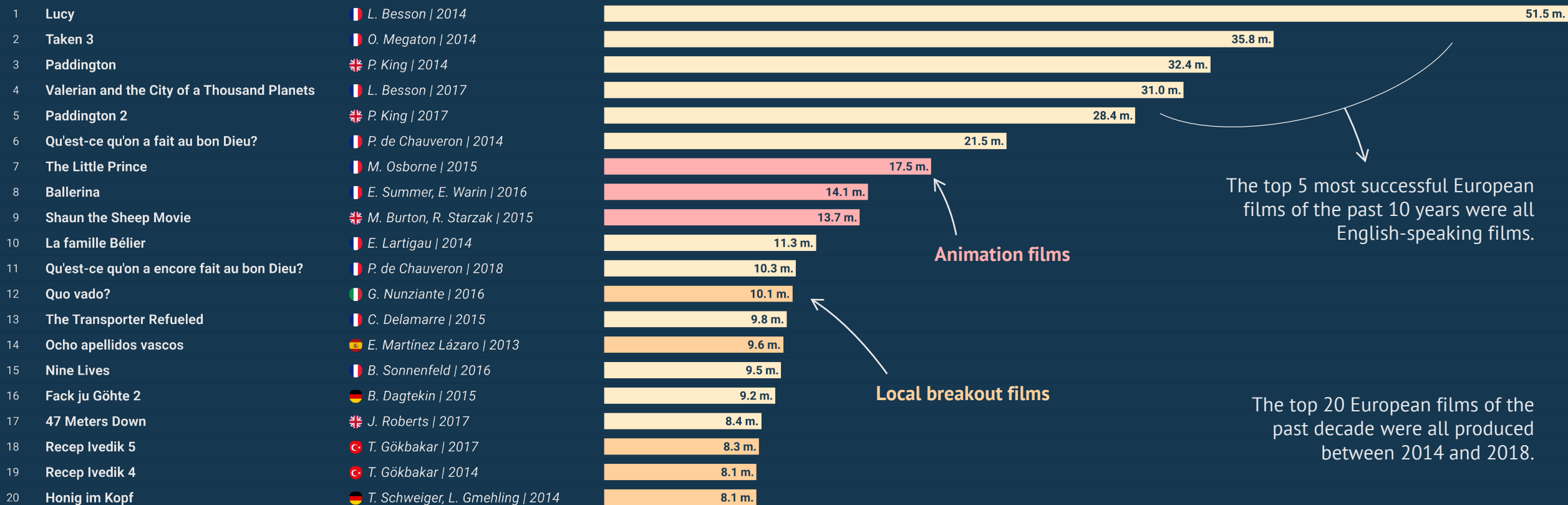
Top 20 European films in 2023, by export admissions. Ranked by 2023 export admissions in 53 markets worldwide.



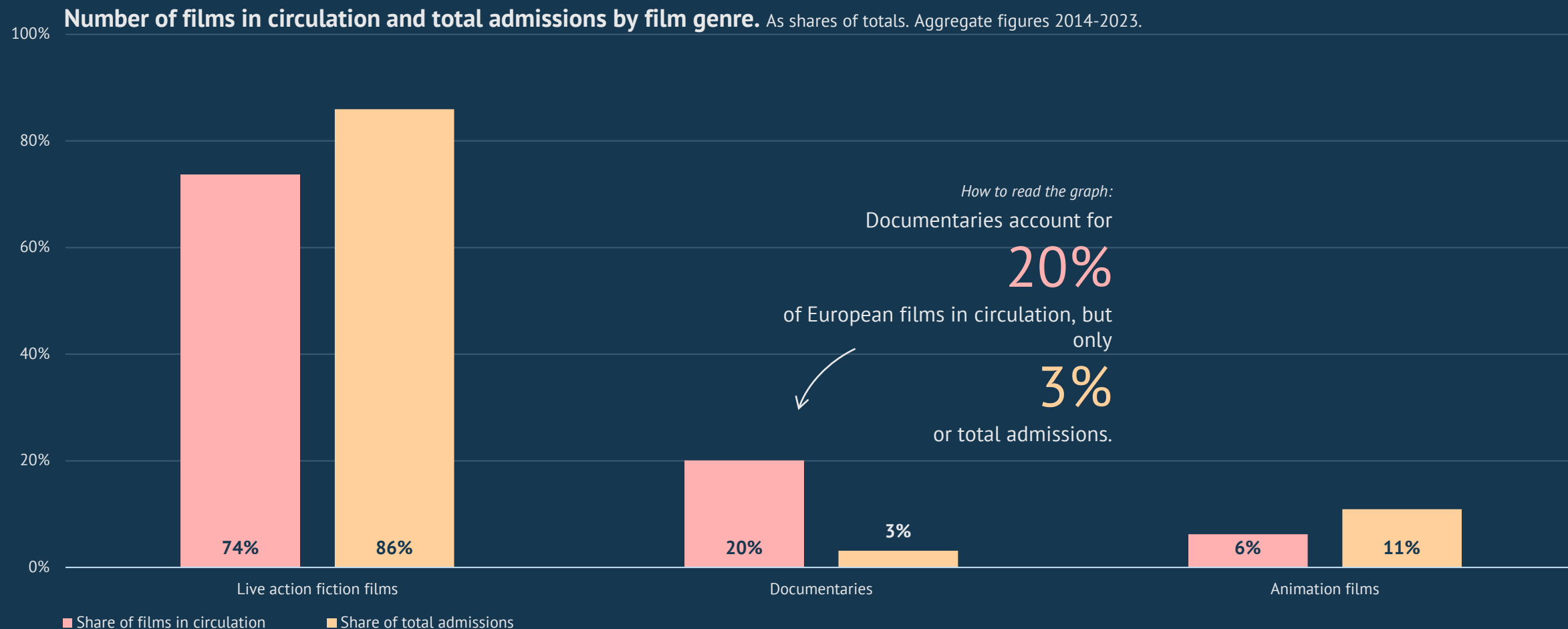
Figures were retrieved from admissions data for 53 markets worldwide. Only the first country of origin is disclosed. Festival favorites are defined as European films that had their premiere in a competition section at a major film festival. Source: European Audiovisual Observatory.

French and British productions account for the entirety of top European films of the past 10 years.

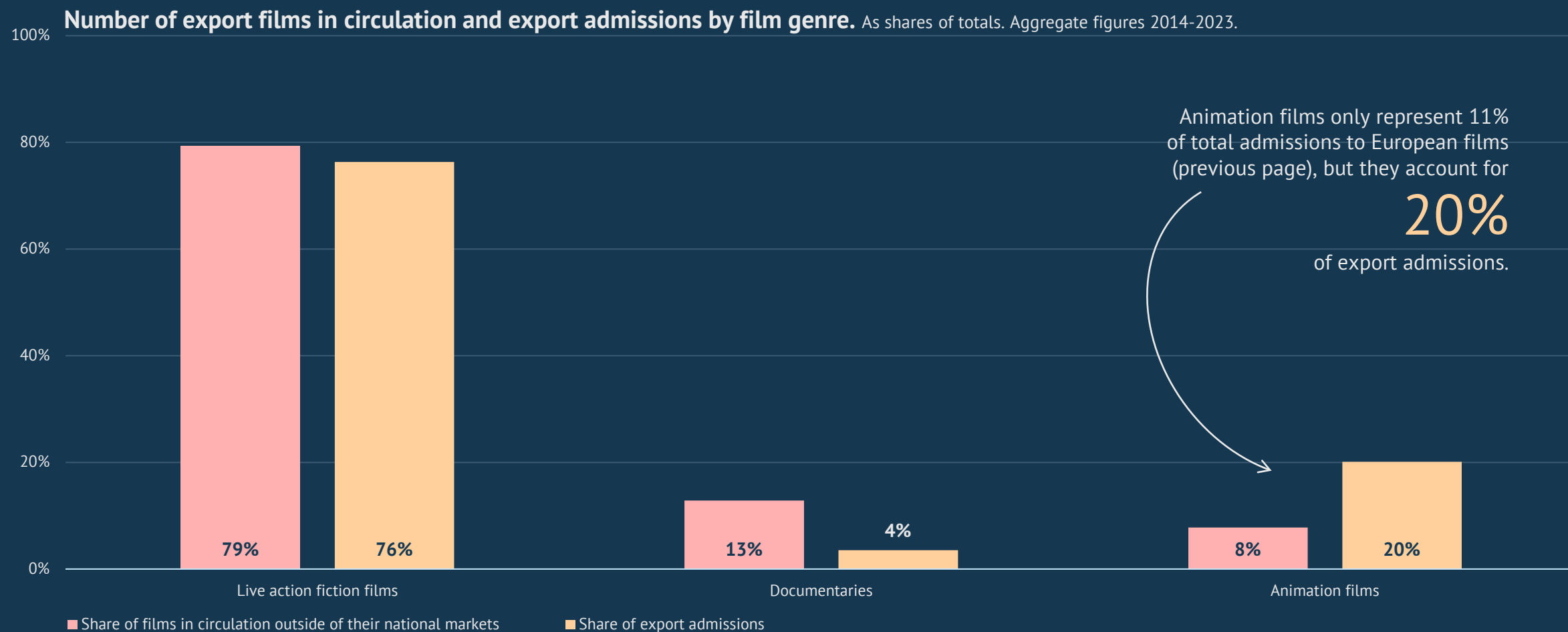
Top 20 European films 2014-2023, by total admissions. Ranked by aggregate 2014-2023 admissions in 45 markets worldwide.



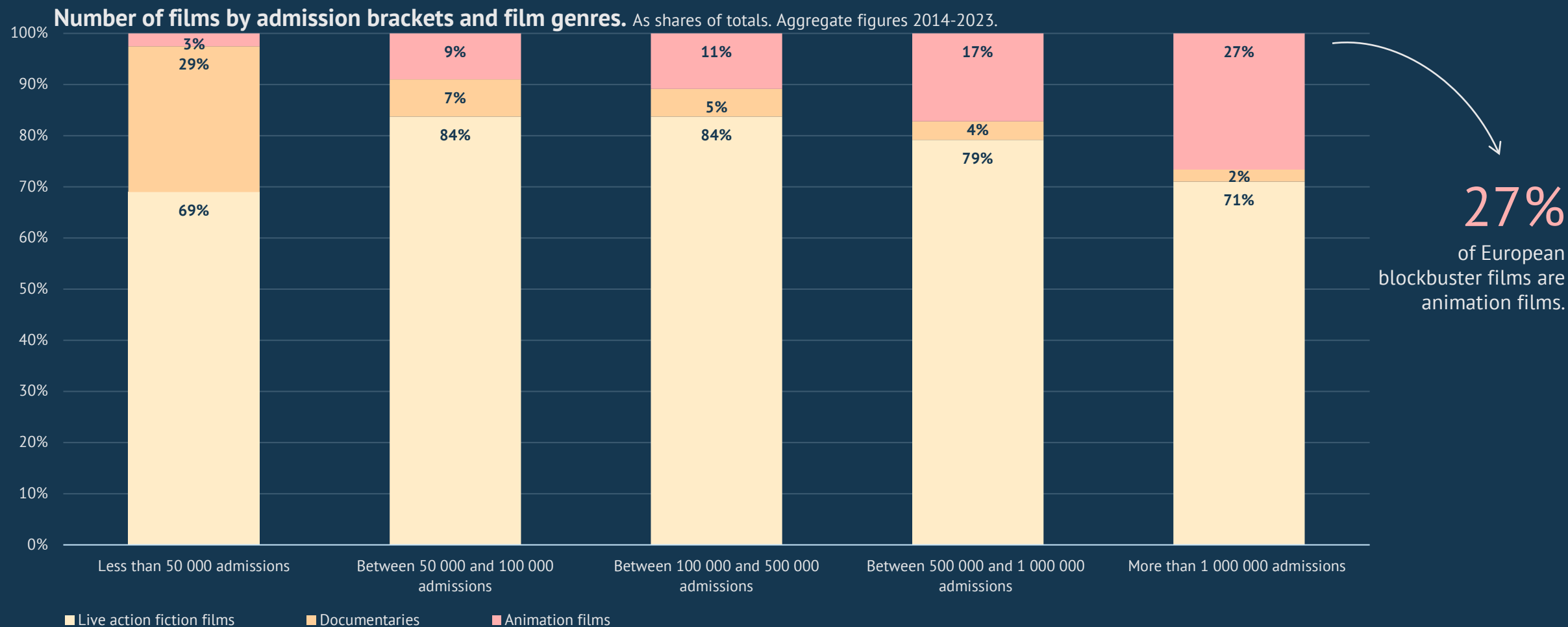
Live action fiction films represent the overwhelming majority of films in circulation and admissions to European films.



Animation films travel better than fiction films and documentaries: if only export admissions are considered, their market share almost doubles.



The share of animation films is greater among those achieving over one million admissions, whereas documentaries mostly consist of films grossing less than 50 000 admissions.



Made in Europe

Theatrical distribution of European films across the globe 2014-2023

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