



Co-production of cinematographic works

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'NATIONAL FILM' OR CO-PRODUCTION?

National film

Ex.: *"Anatomy of a Fall"* (2023), dir. by Justine Triet

Producing country

- FR (100%) → Producer

Markets

- FR → 'Home' / 'national' market
- Other countries → 'Non-national' markets



► National film in FR

Co-production

Ex.: *"Five and a Half Love Stories in an Apartment in Vilnius, Lithuania"* (2023), dir. by Tomas Vengris

Co-producing countries

- LT (70%) → Majority co-producer
- LV (15%) } Minority
- IE (15%) } co-producers

Markets

- LT (LV/IE) → 'Home' / 'national' markets
- Other countries → 'Non-national' markets

► National film in LT (LV and IE)





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► National film in FR

Co-production

Ex.: *"My Fairy Troublemaker"* (2022), dir. by Caroline Origer

Co-producing countries

- LU (60%) → Majority co-producer
- DE (40%) → Minority co-producer

Markets

- LU (DE) → 'Home' / 'national' markets
- Other countries → 'Non-national' markets



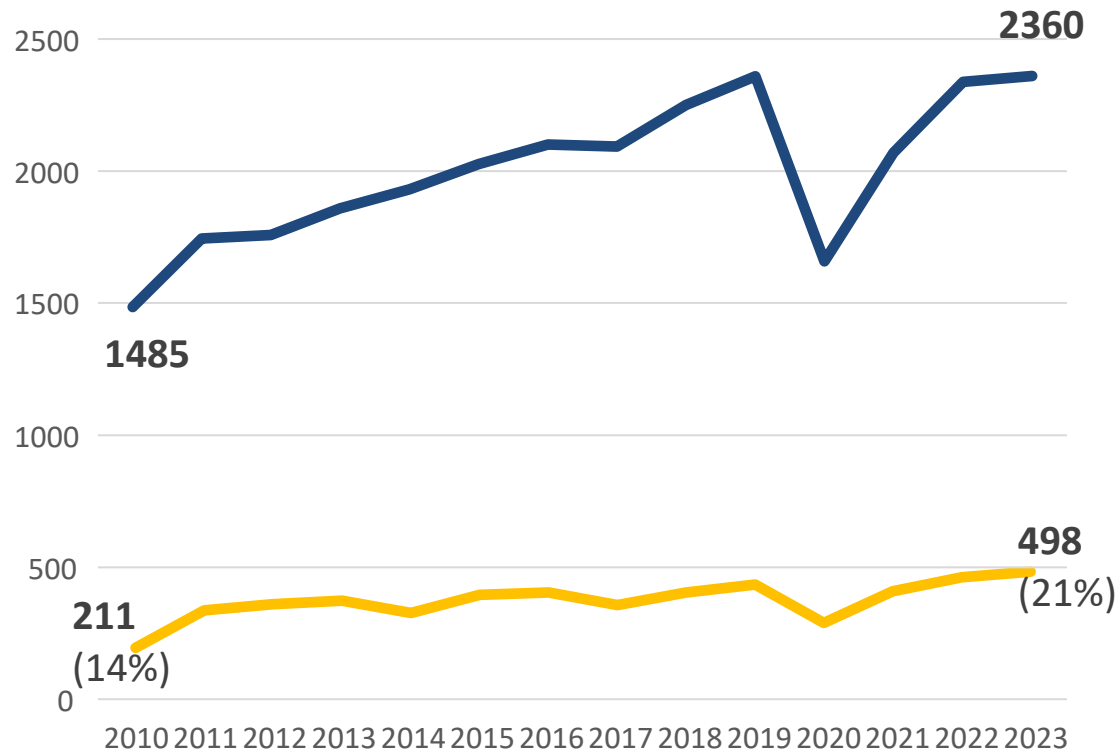
► National film in LU (and DE)



CO-PRODUCTION: AN INEXORABLE RISE?

Number of feature films produced in Europe, 2010-2023

Estimated



~ 28 000
European feature films

~ 5 440
co-productions
led by European
producers

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~ 3 050 applications

~ 56%
of European
co-productions

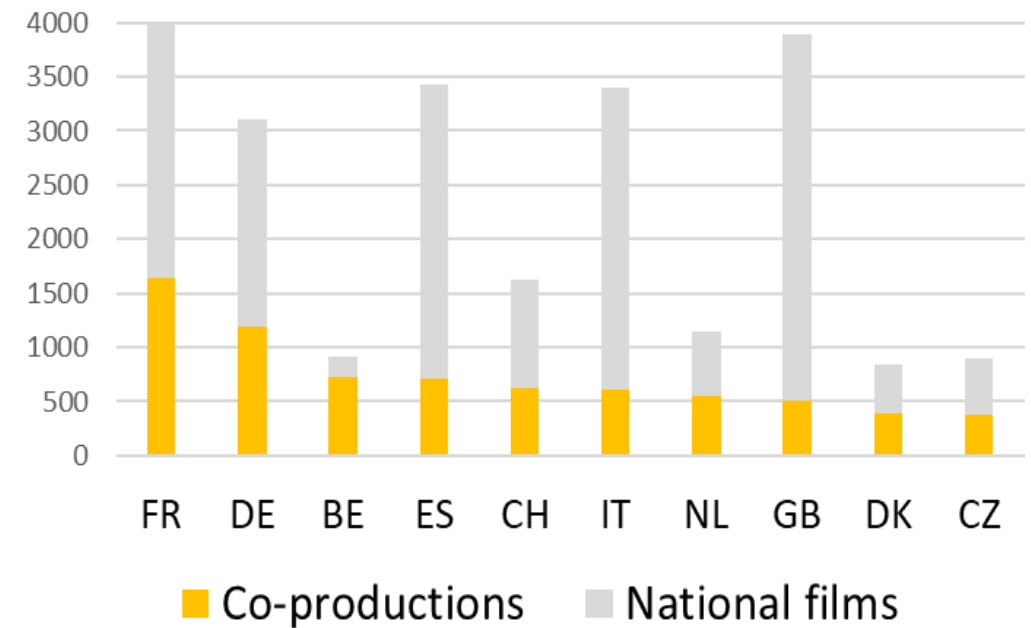


TOP CO-PRODUCING COUNTRIES 1/2

In number of films,
the main producing countries
were also the top co-producers

Top European countries by nr of co-productions, 2010-2023

Estimated. In nr of films



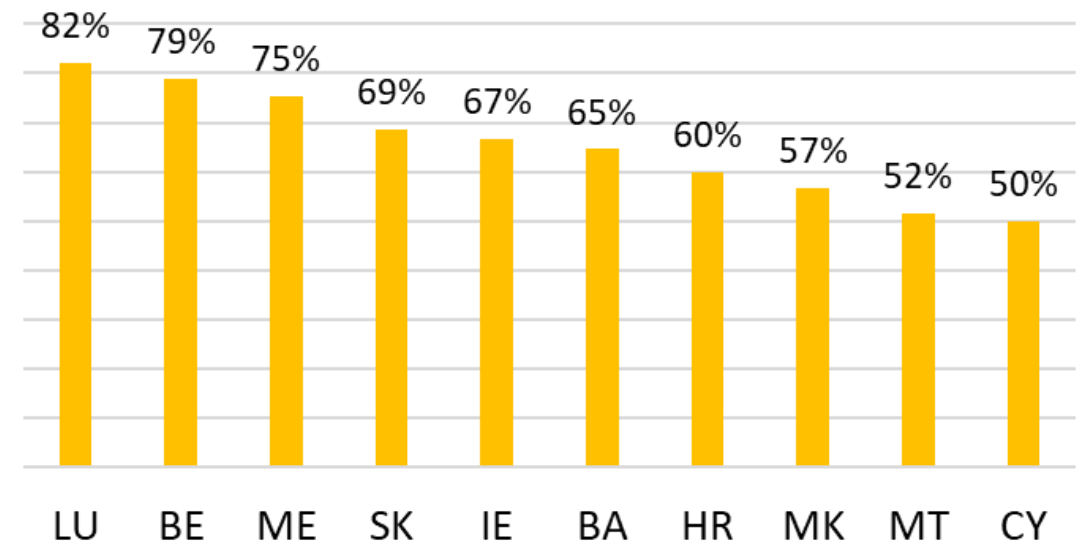


TOP CO-PRODUCING COUNTRIES 2/2

In turn, the share of co-productions (out of all feature films) was higher in small or medium-sized countries

Top European countries by % of co-productions, 2010-2023

Estimated



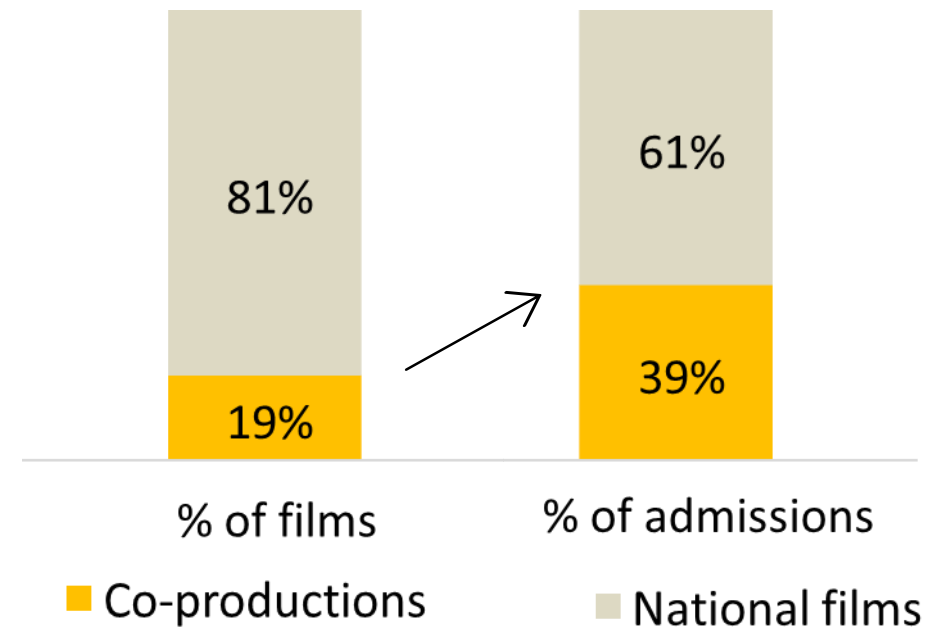


% OF FILMS AND ADMISSIONS

Co-productions account for
19% of European films ...
(vs. 7% for TV fiction)

... but generate
39% of total ticket sales
to European films worldwide
(>50% including films backed by US studios)

**% of European films and % of worldwide admissions
to European films, by production type, 2014-2023**
Estimated





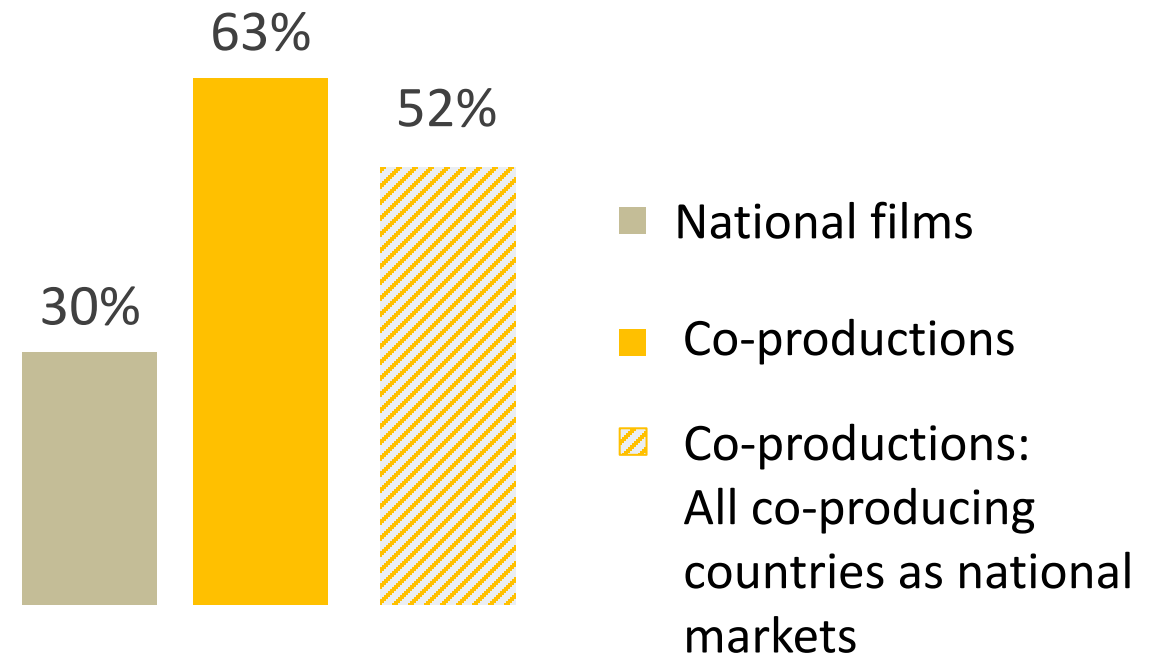
'EXPORT RATIO'

Co-productions are more likely to be shown in cinemas outside their home countries compared to purely national films

This holds true even when all co-producing countries are considered as 'home markets'

% of European films with at least a non-national release, by production type, 2014-2023

Estimated





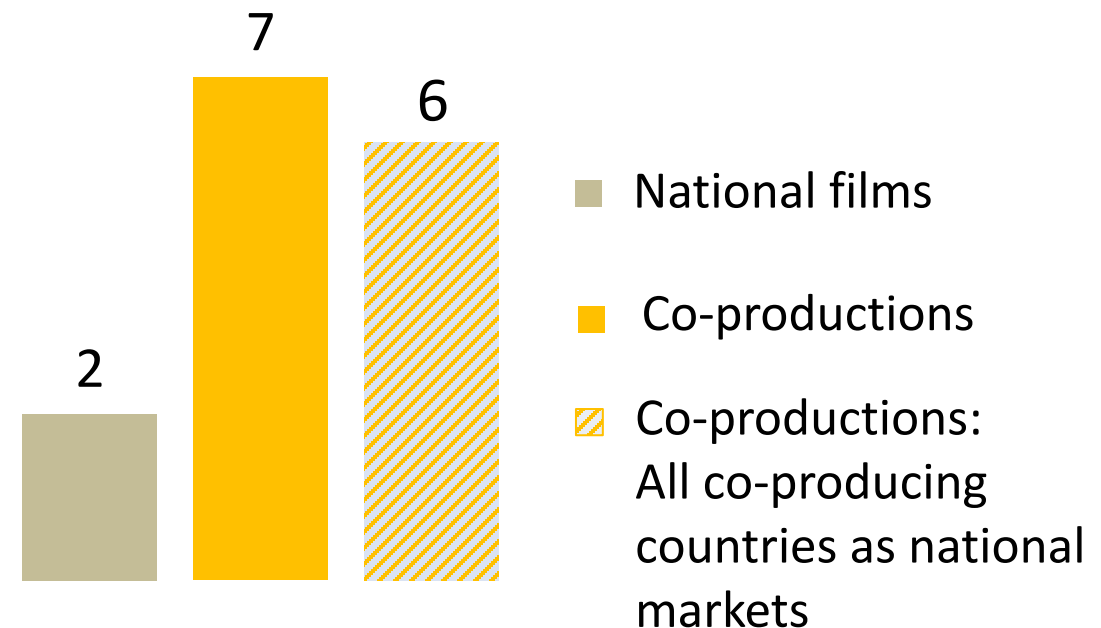
CIRCULATION

On average, co-productions are released in more markets outside their home countries than national films....

... true even when all co-producing countries are considered as 'home markets'

Average number of non-national release markets, by production type, 2014-2023

Estimated





CONCENTRATION OF ADMISSIONS

Based on 2014-2023 average

Nearly half top 100 European films
by admissions are co-productions

% of co-productions

19%

All European
films

47%

Top 100
European
films

68%

Top 100
European
exports

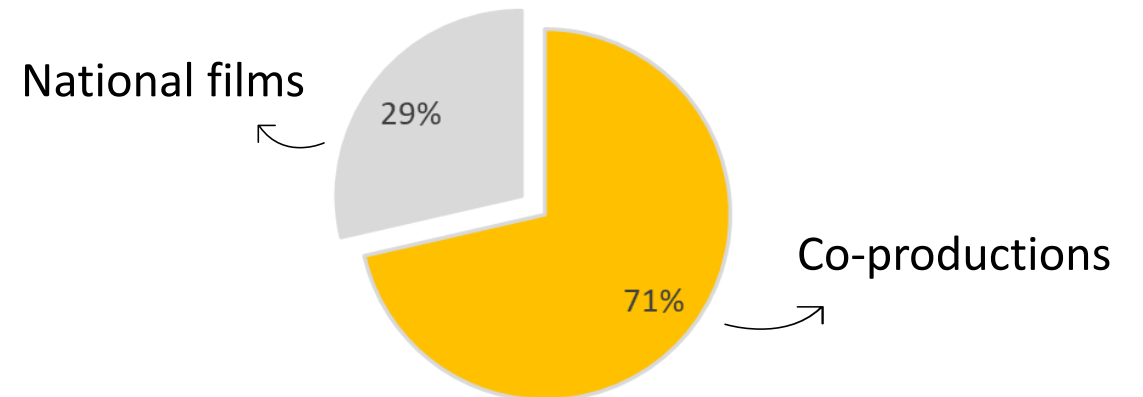


FESTIVALS

More than two thirds of
European award-winning films
at major film festivals are
co-productions

Breakdown of European award-winning* films, by co-production type, 2014-2023

Estimated



* Cannes, Berlinale, Venice, San Sebastián, Academy Awards' Best International Feature



Thank you!

