Made in Europe

Theatrical distribution of European films across the globe

2014 - 2023

Manuel Fioroni

November 2024

A publication of the European Audiovisual Observatory

European Audiovisual Observatory

COUNCIL OF EUROPE

CONSEIL DE L'EUROPE

Table of Contents

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).

02

Key insights

Key 2023 figures

3 349

European films in circulation worldwide[1]
+7.8% compared to 2022

1 630

European films on release outside of their national market (export films)
+12.0% compared to 2022

6%

Admissions to European films as a share of total global admissions
-1.8 percentage points compared to 2022

32%

Export admissions as a share of total admissions for European films
-2.2 percentage points compared to 2022

239 m

Admissions to European films
+2.7% compared to 2022

76 m

Export admissions to European films (export admissions)
-3.9% compared to 2022

52%

European films as a share of total films in circulation worldwide
-1.4 percentage points compared to 2022

2.25

Average number of exploitation markets for a European film
+4.1% compared to 2022

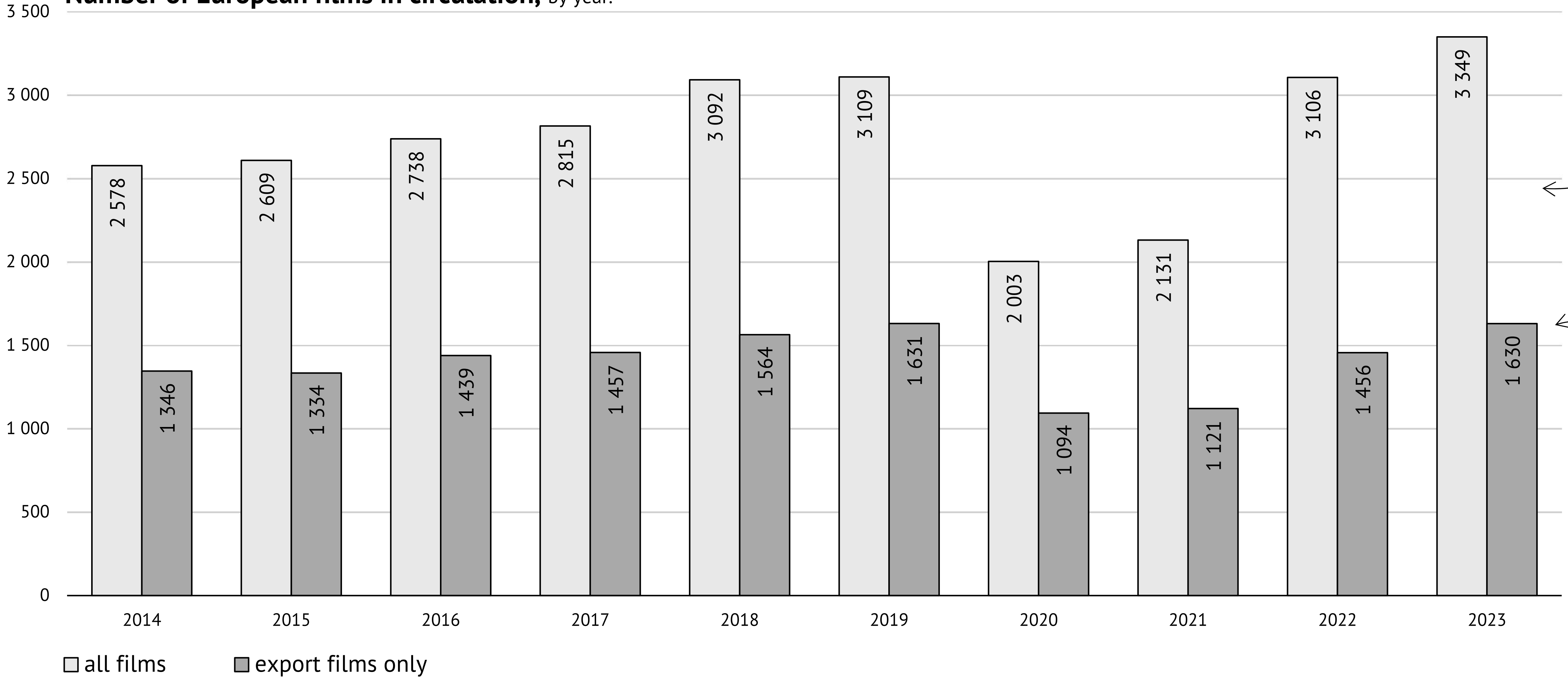
---

[1] Figures were retrieved from admissions data for 53 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 pandemic years, the number of European films available in theatres has constantly risen in the past decade.

Number of European films in circulation, by year.



3 349

European films were in circulation in 2023.

...of which

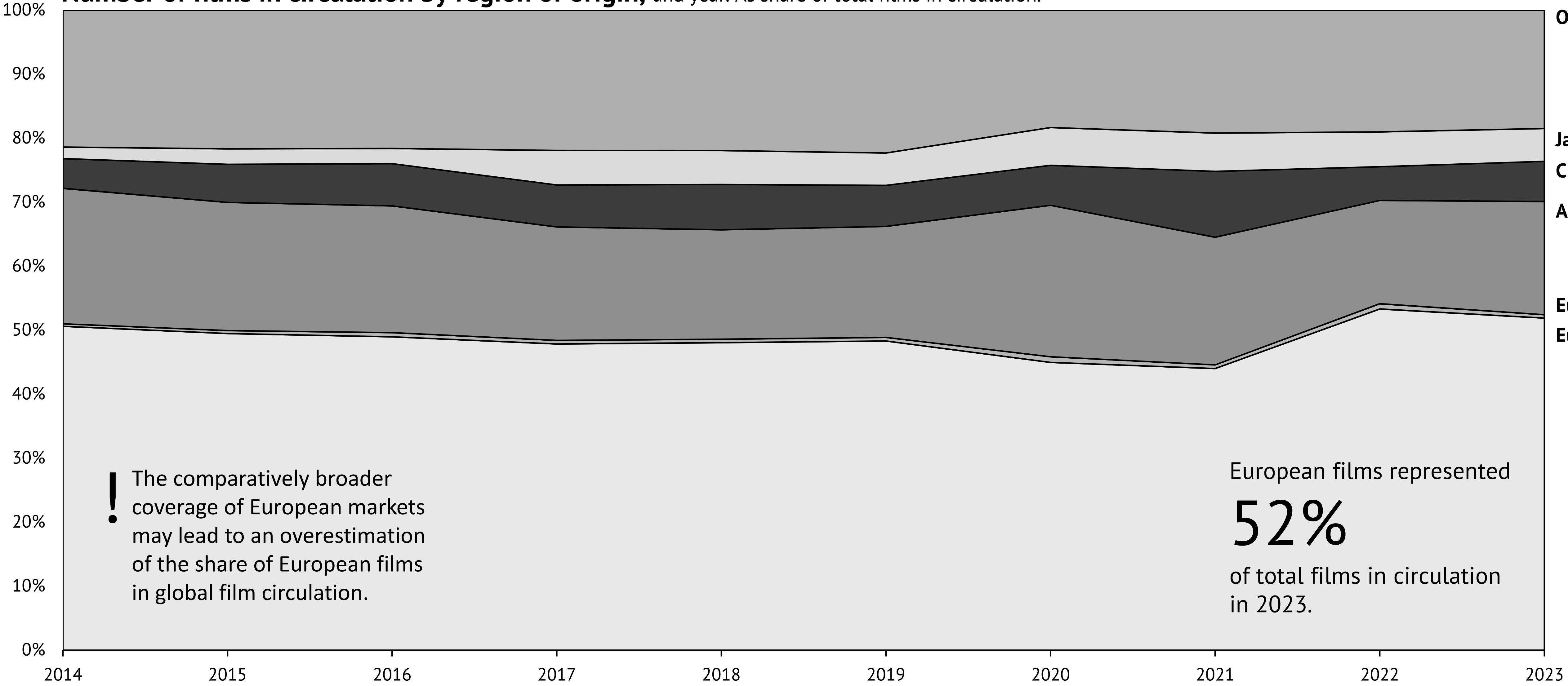
49%

were distributed outside of their national market.

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.

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

Number of films in circulation by region of origin, and year. As share of total films in circulation.



! The comparatively broader coverage of European markets may lead to an overestimation of the share of European films in global film circulation.

European films represented

52%

of total films in circulation in 2023.

2023 - Share of films in circulation by region of origin:

Other films 18%

Japanese films 5%

Chinese films 6%

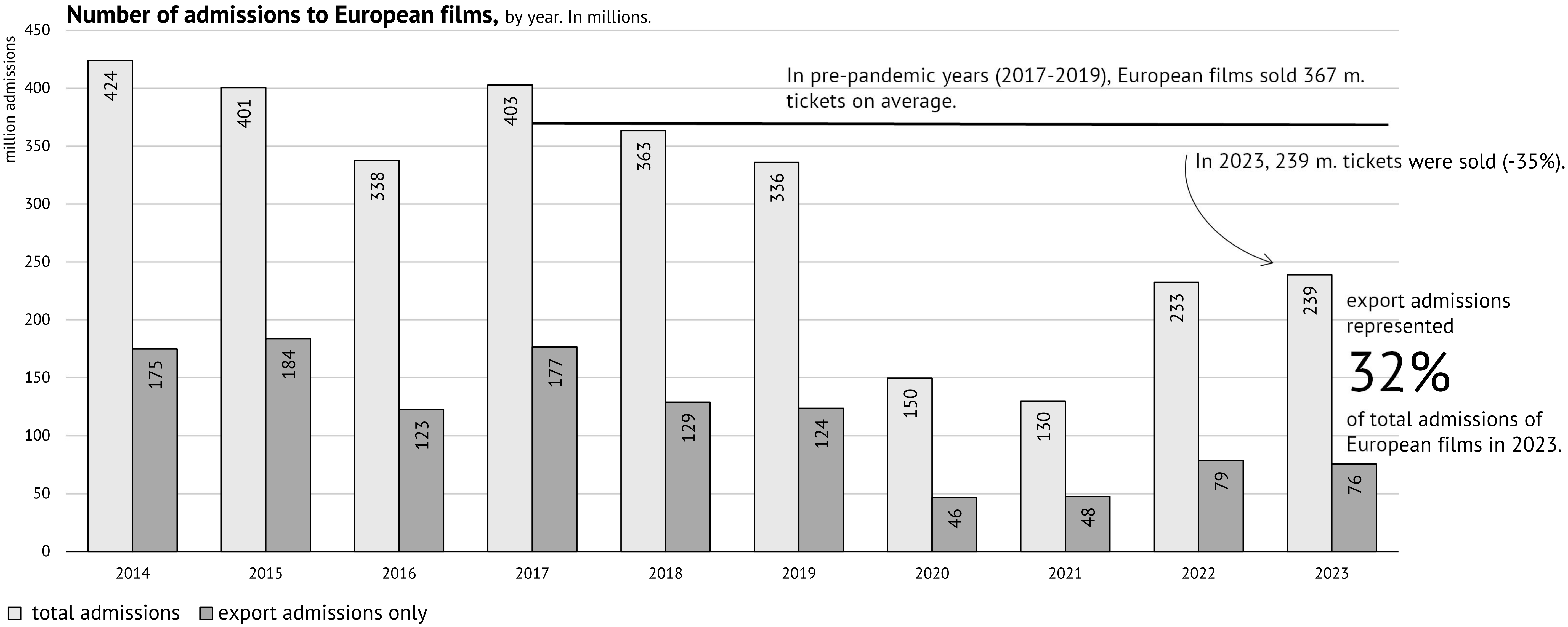
American films 18%

European INC films 1%

European films 52%

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.

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



Number of admissions to European films, by year. In millions.

In pre-pandemic years (2017-2019), European films sold 367 m. tickets on average.

In 2023, 239 m. tickets were sold (-35%).

export admissions represented

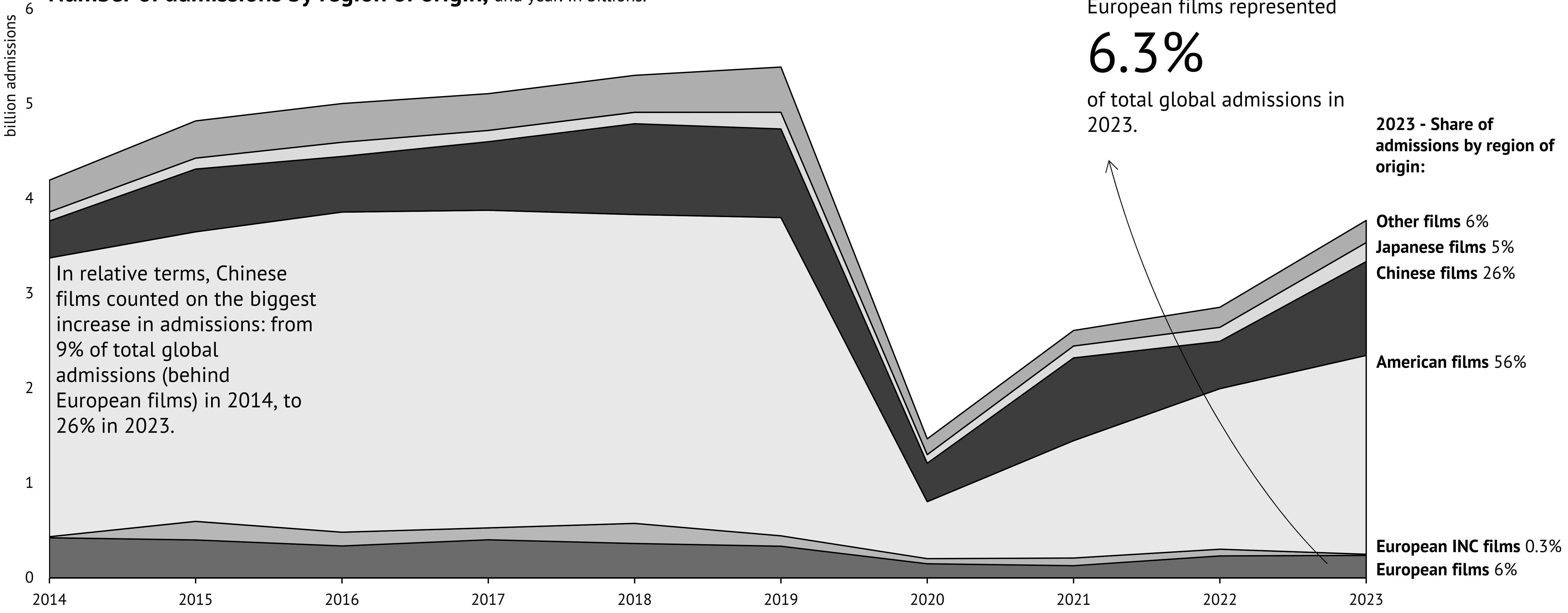
32%

of total admissions of European films in 2023.

Figures were retrieved from admissions data for 45 markets worldwide. Source: European Audiovisual Observatory.

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.

Number of admissions by region of origin, and year. In billions.



European films represented

6.3%

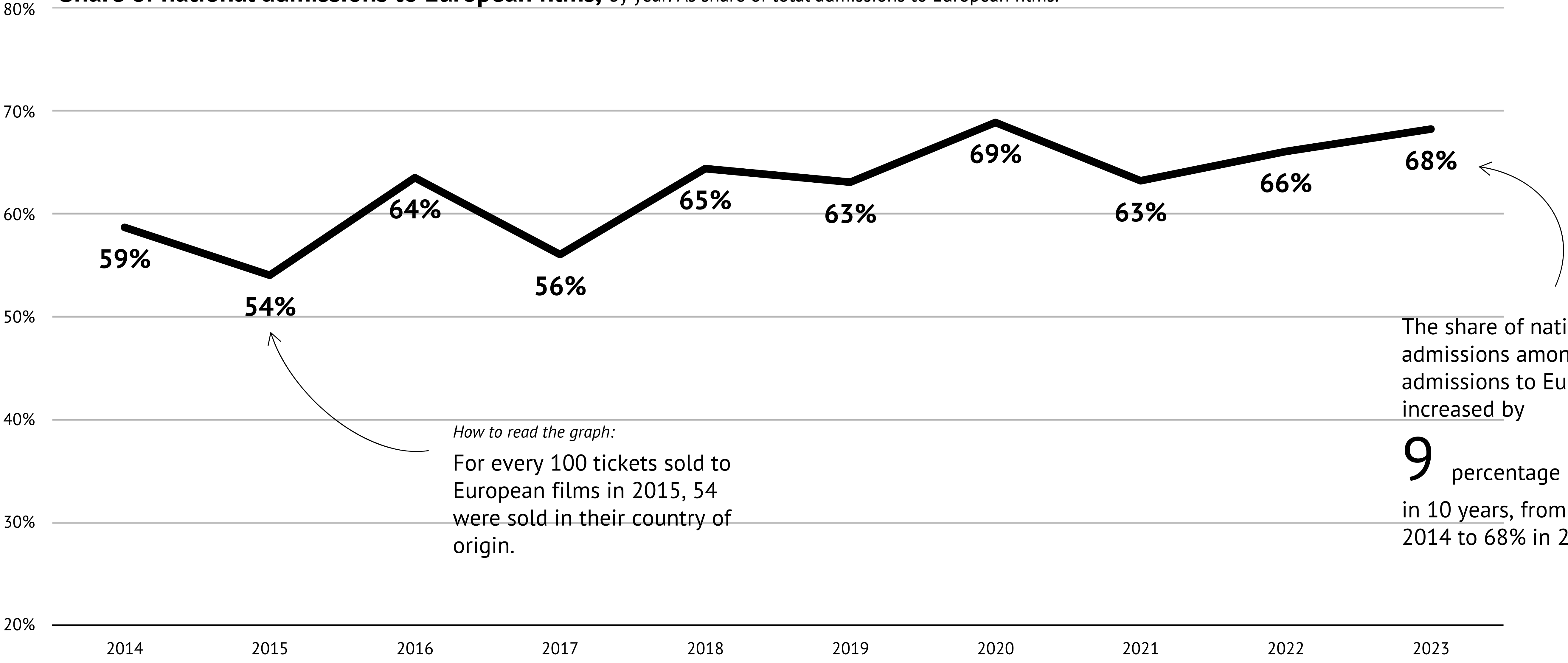
of total global admissions in 2023.

In relative terms, Chinese films counted on the biggest increase in admissions: from 9% of total global admissions (behind European films) in 2014, to 26% in 2023.

Figures were retrieved from admissions data for 45 markets worldwide. Source: European Audiovisual Observatory.

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

Share of national admissions to European films, by year. As share of total admissions to European films.



How to read the graph:

For every 100 tickets sold to European films in 2015, 54 were sold in their country of origin.

The share of national admissions among total admissions to European films increased by

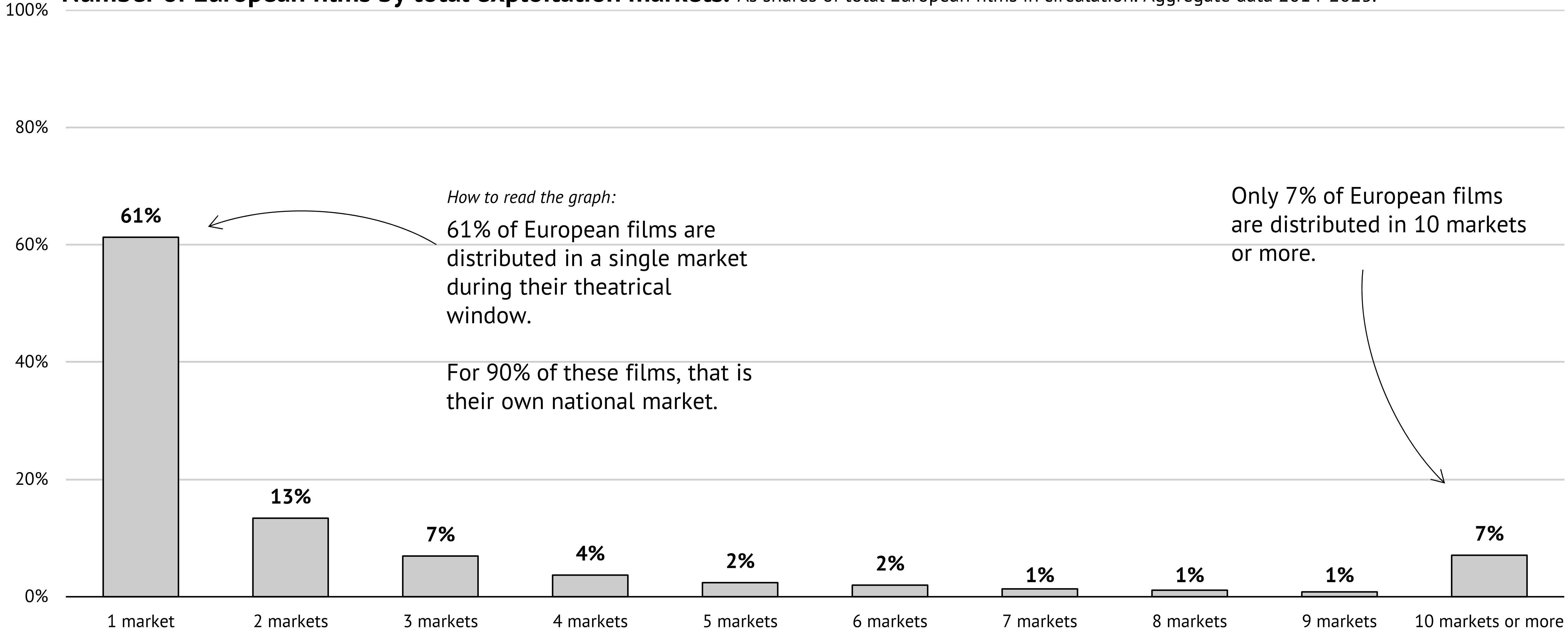
9 percentage points

in 10 years, from 59% in 2014 to 68% in 2023.

Figures were retrieved from admissions data for 45 markets worldwide. Source: European Audiovisual Observatory.

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

Number of European films by total exploitation markets. As shares of total European films in circulation. Aggregate data 2014-2023.



How to read the graph:

61% of European films are distributed in a single market during their theatrical window.

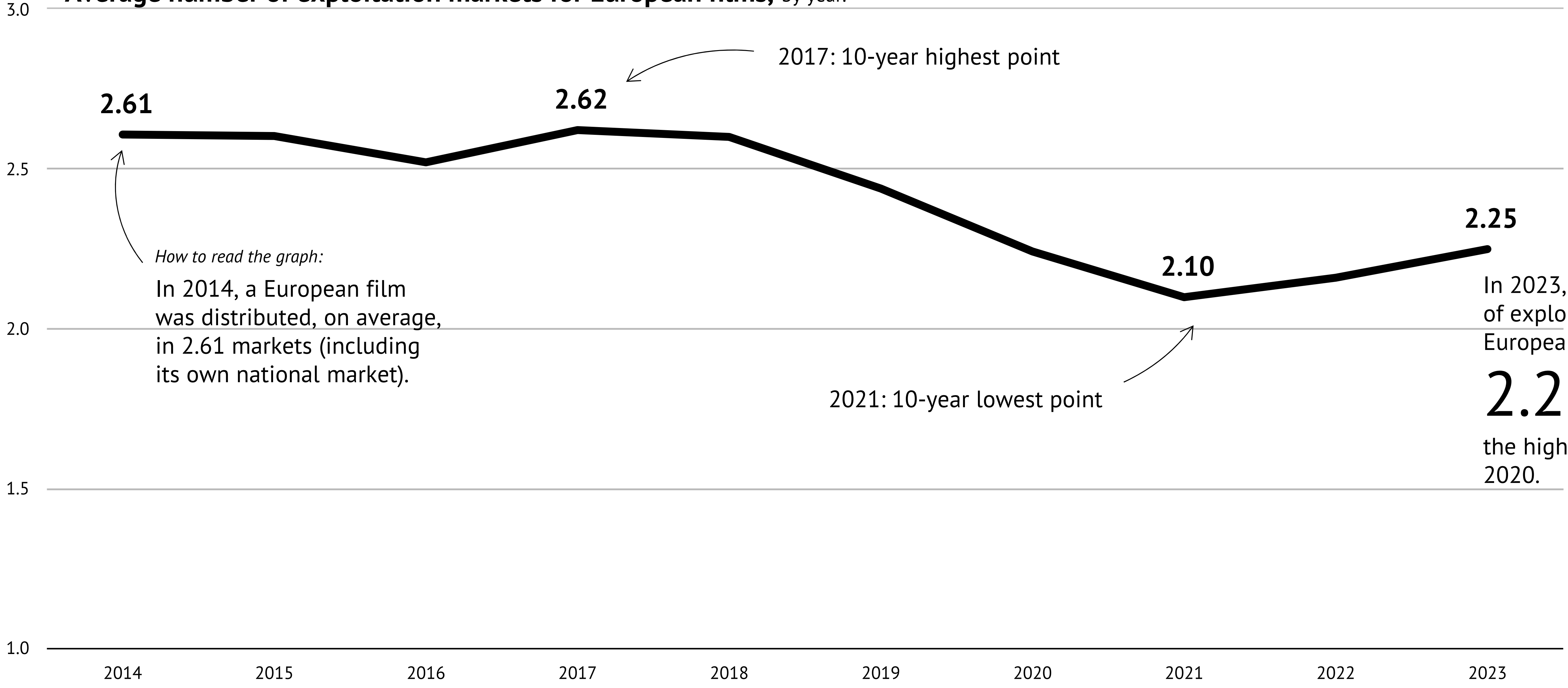
For 90% of these films, that is their own national market.

Only 7% of European films are distributed in 10 markets or more.

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. To minimize the influence of repertory screenings, only films produced from 2012 onwards were included in the analysis. Source: European Audiovisual Observatory.

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

Average number of exploitation markets for European films, by year.



2017: 10-year highest point

How to read the graph:

In 2014, a European film was distributed, on average, in 2.61 markets (including its own national market).

2021: 10-year lowest point

In 2023, the average number of exploitation markets for European films reached

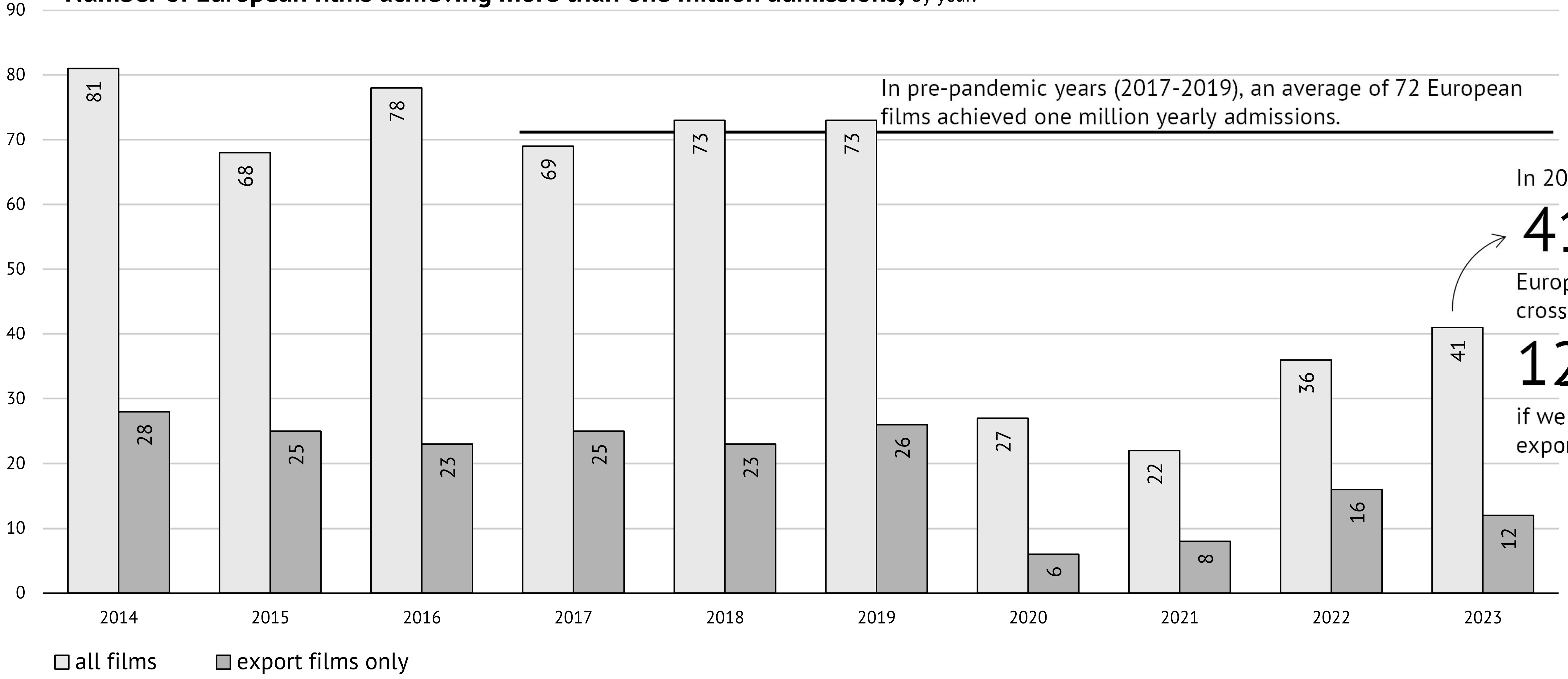
2.25,

the highest figure since 2020.

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.

Number of European films achieving more than one million admissions, by year.



In pre-pandemic years (2017-2019), an average of 72 European films achieved one million yearly admissions.

In 2023, only

41

European films managed to cross the threshold.

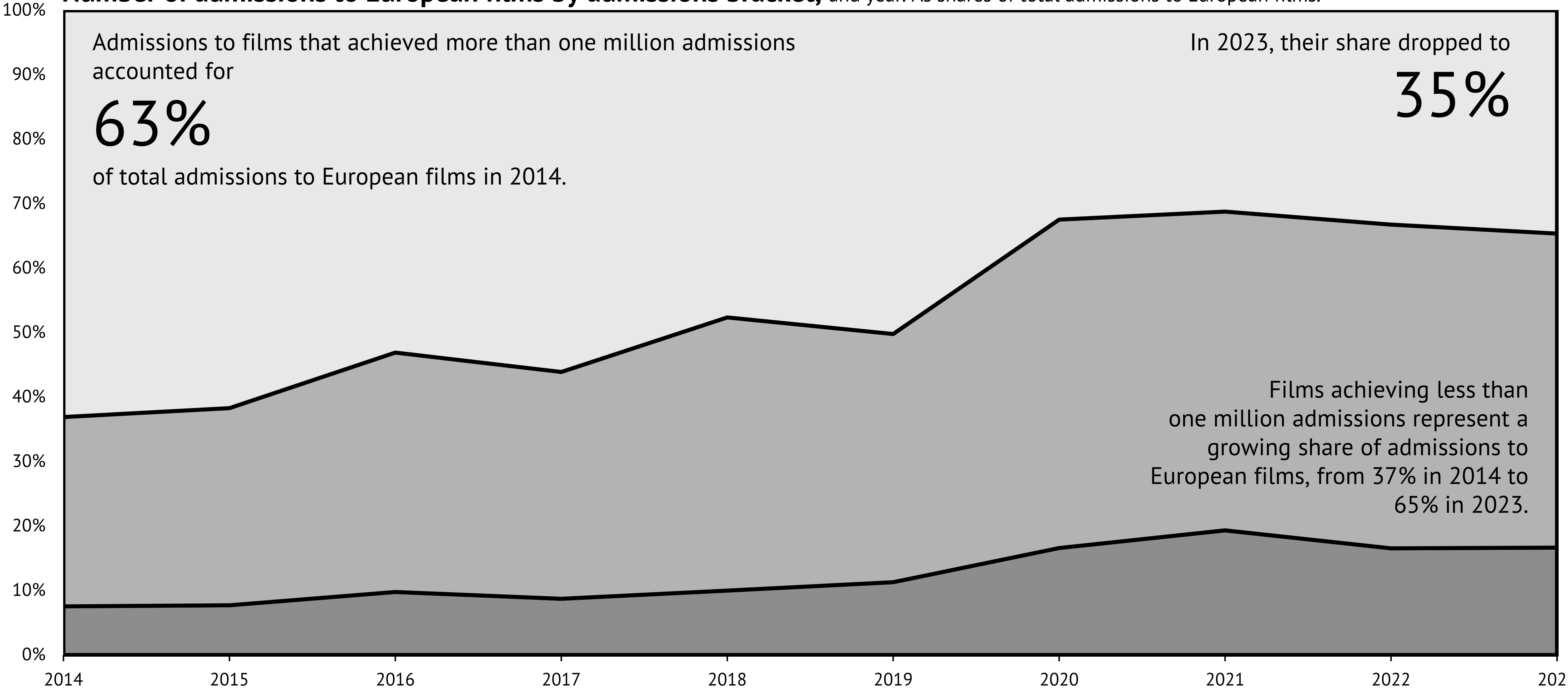
12

if we only consider export admissions.

Figures were retrieved from admissions data for 45 markets worldwide. Source: European Audiovisual Observatory.

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

Number of admissions to European films by admissions bracket, and year. As shares of total admissions to European films.



Admissions to films that achieved more than one million admissions accounted for

63%

of total admissions to European films in 2014.

In 2023, their share dropped to

35%

Films achieving less than one million admissions represent a growing share of admissions to European films, from 37% in 2014 to 65% in 2023.

2023 - Share of European films that achieved:

More than 1 000 000 admissions
35%

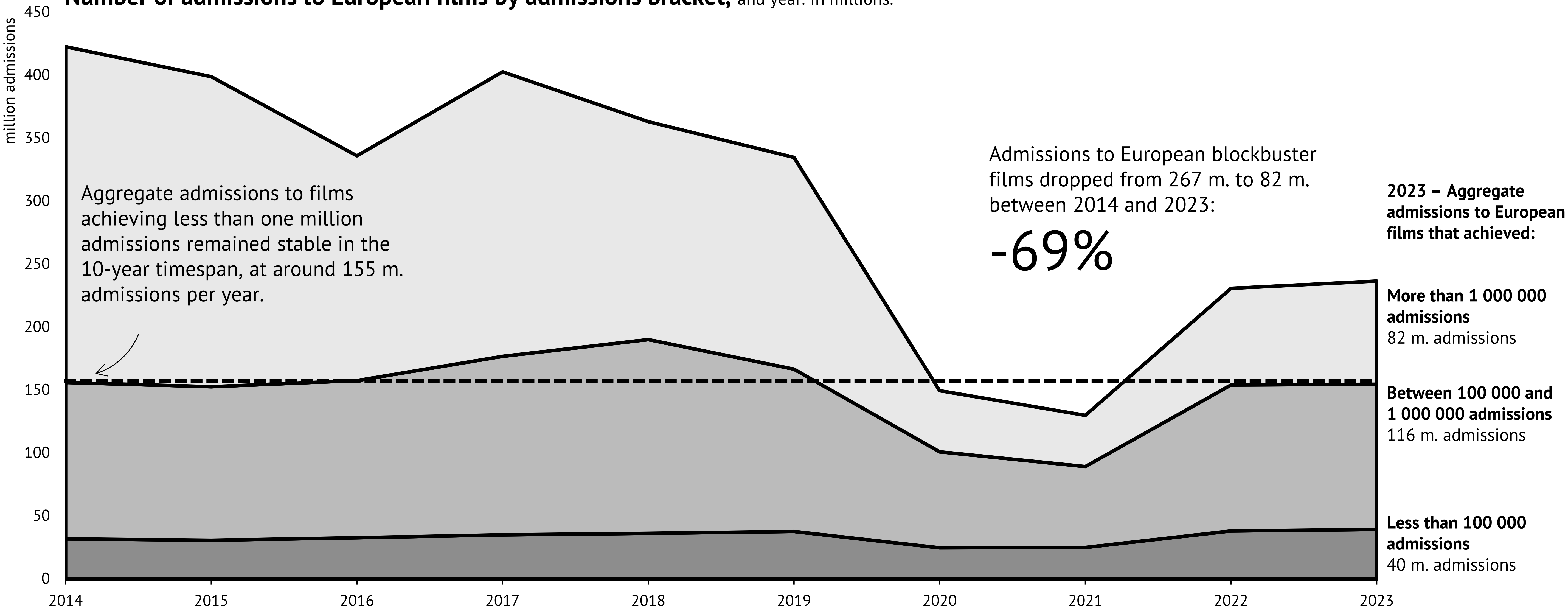
Between 100 000 and 1 000 000 admissions
49%

Less than 100 000 admissions
17%

Figures were retrieved from admissions data for 45 markets worldwide. Source: European Audiovisual Observatory.

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.

Number of admissions to European films by admissions bracket, and year. In millions.



Aggregate admissions to films achieving less than one million admissions remained stable in the 10-year timespan, at around 155 m. admissions per year.

Admissions to European blockbuster films dropped from 267 m. to 82 m. between 2014 and 2023:

-69%

2023 – Aggregate admissions to European films that achieved:

More than 1 000 000 admissions
82 m. admissions

Between 100 000 and 1 000 000 admissions
116 m. admissions

Less than 100 000 admissions
40 m. admissions

Figures were retrieved from admissions data for 45 markets worldwide. Source: European Audiovisual Observatory.

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:

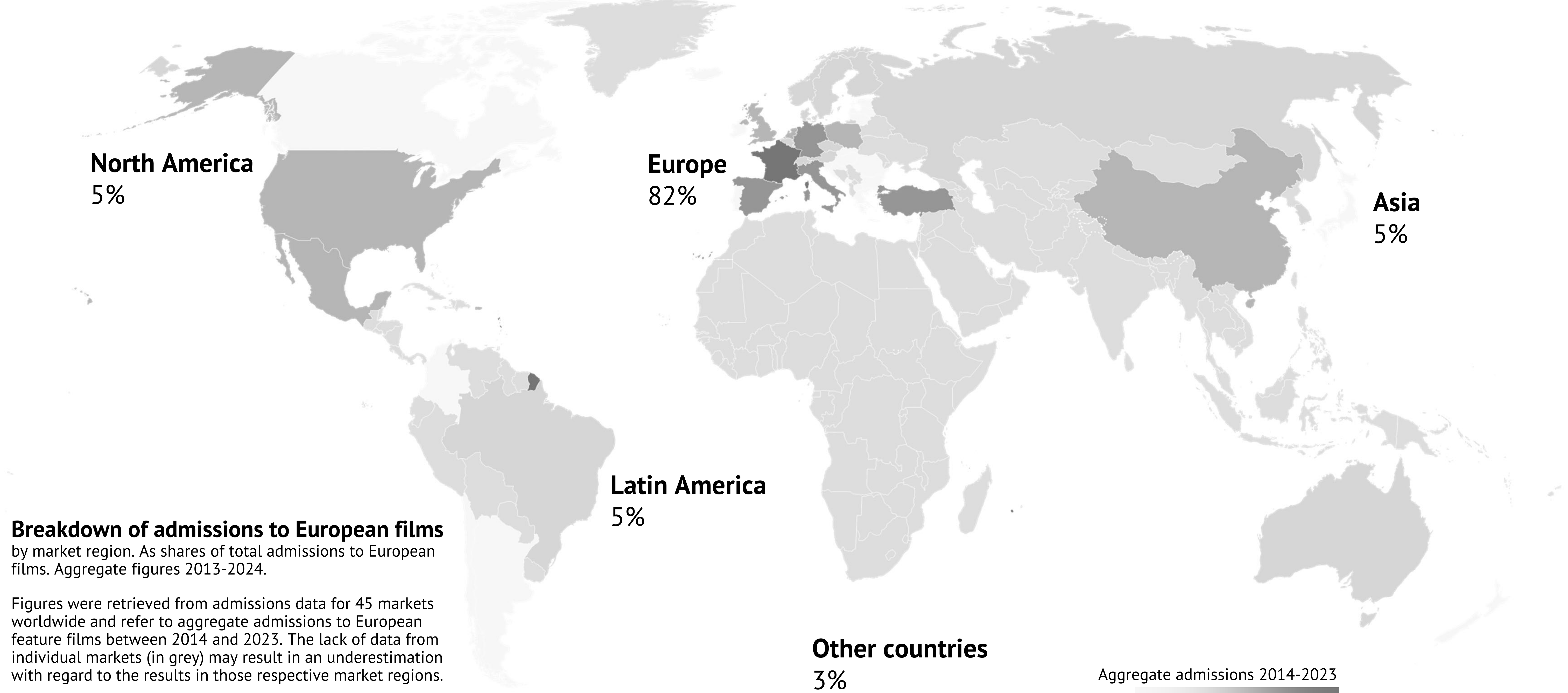
1. France	31%
2. Germany	10%
3. Italy	9%

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

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

Figures were retrieved from admissions data for 53 markets worldwide. Source: European Audiovisual Observatory.

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



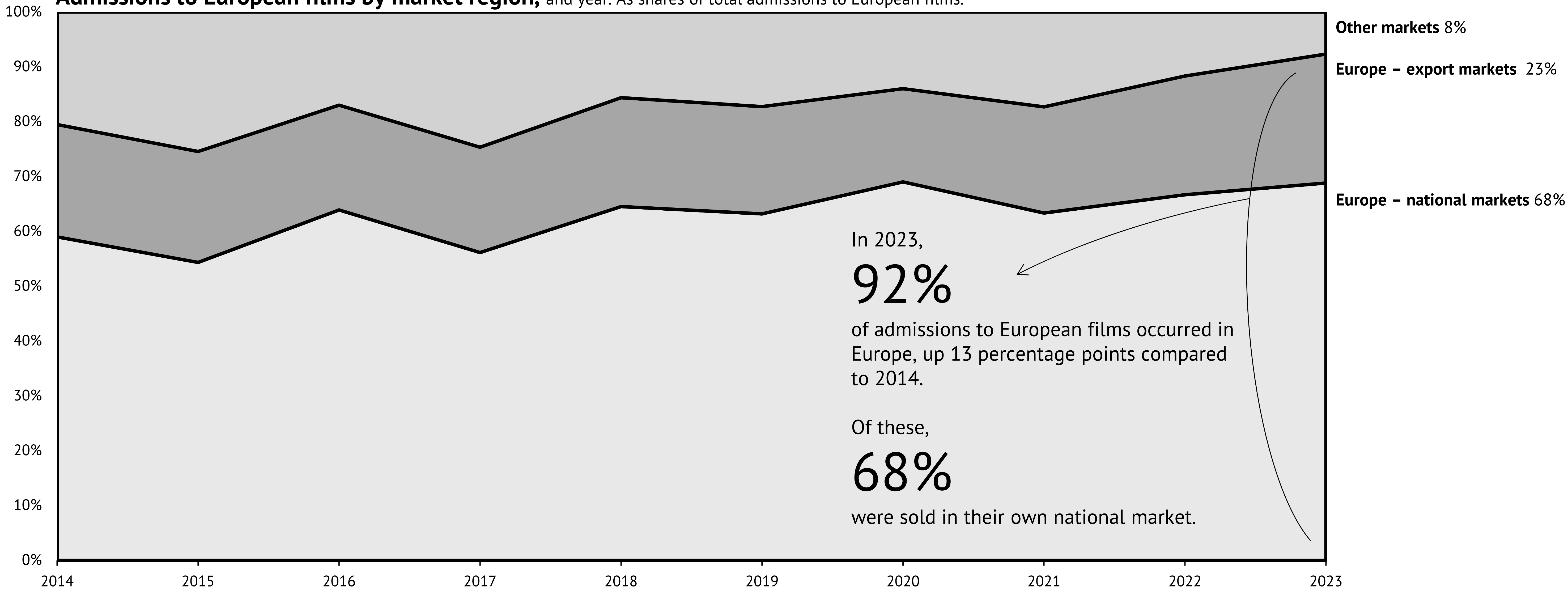
Breakdown of admissions to European films by market region. As shares of total admissions to European films. Aggregate figures 2013-2024.

Figures were retrieved from admissions data for 45 markets worldwide and refer to aggregate admissions to European feature films between 2014 and 2023. The lack of data from individual markets (in grey) may result in an underestimation with regard to the results in those respective market regions.

Source: European Audiovisual Observatory.

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

Admissions to European films by market region, and year. As shares of total admissions to European films.



2023 – Shares of admissions by market region:

Other markets 8%

Europe – export markets 23%

Europe – national markets 68%

In 2023,

92%

of admissions to European films occurred in Europe, up 13 percentage points compared to 2014.

Of these,

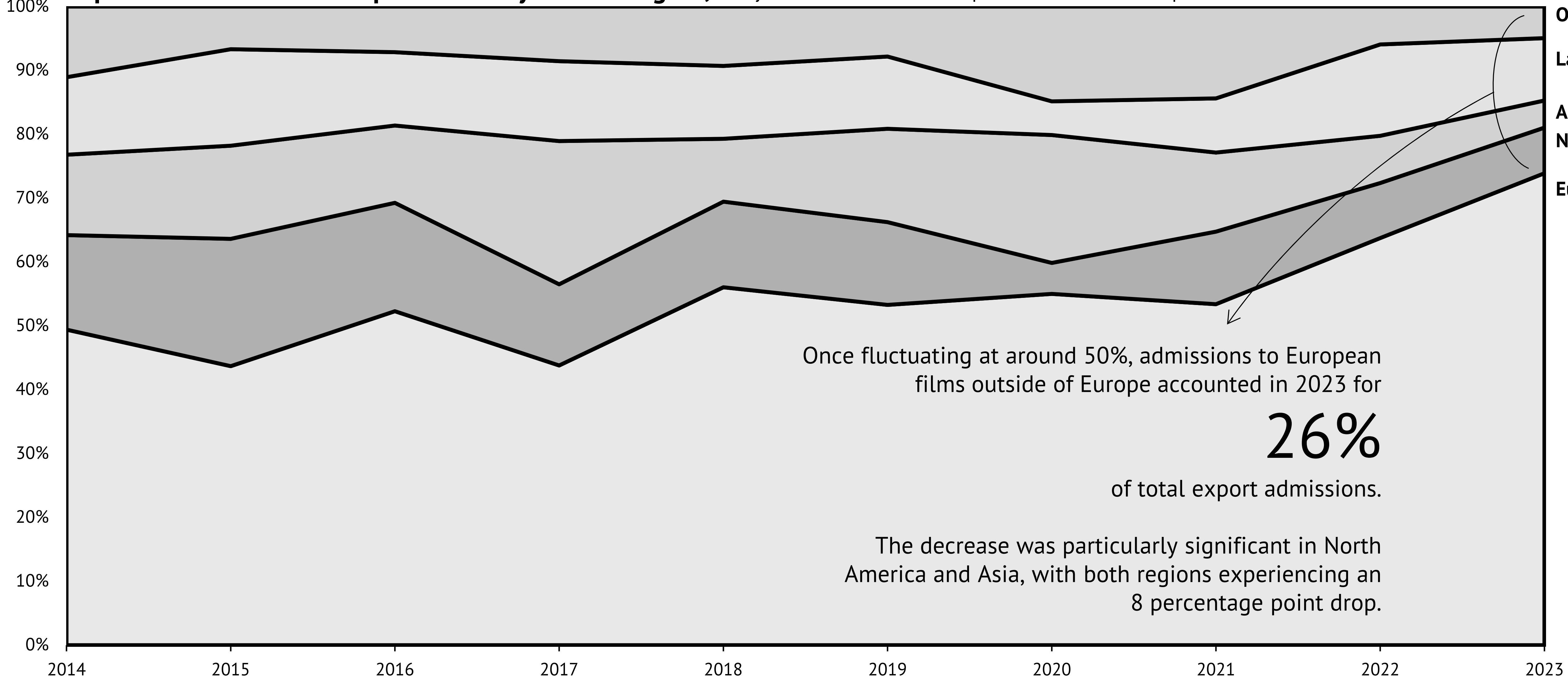
68%

were sold in their own national market.

Figures were retrieved from admissions data for 45 markets worldwide. Source: European Audiovisual Observatory.

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

Export admissions to European films by market region, and year. As shares of total export admissions to European films.



Once fluctuating at around 50%, admissions to European films outside of Europe accounted in 2023 for

26%

of total export admissions.

The decrease was particularly significant in North America and Asia, with both regions experiencing an 8 percentage point drop.

2023 – Shares of export admissions by market region:

Other markets 5%

Latin America 10%

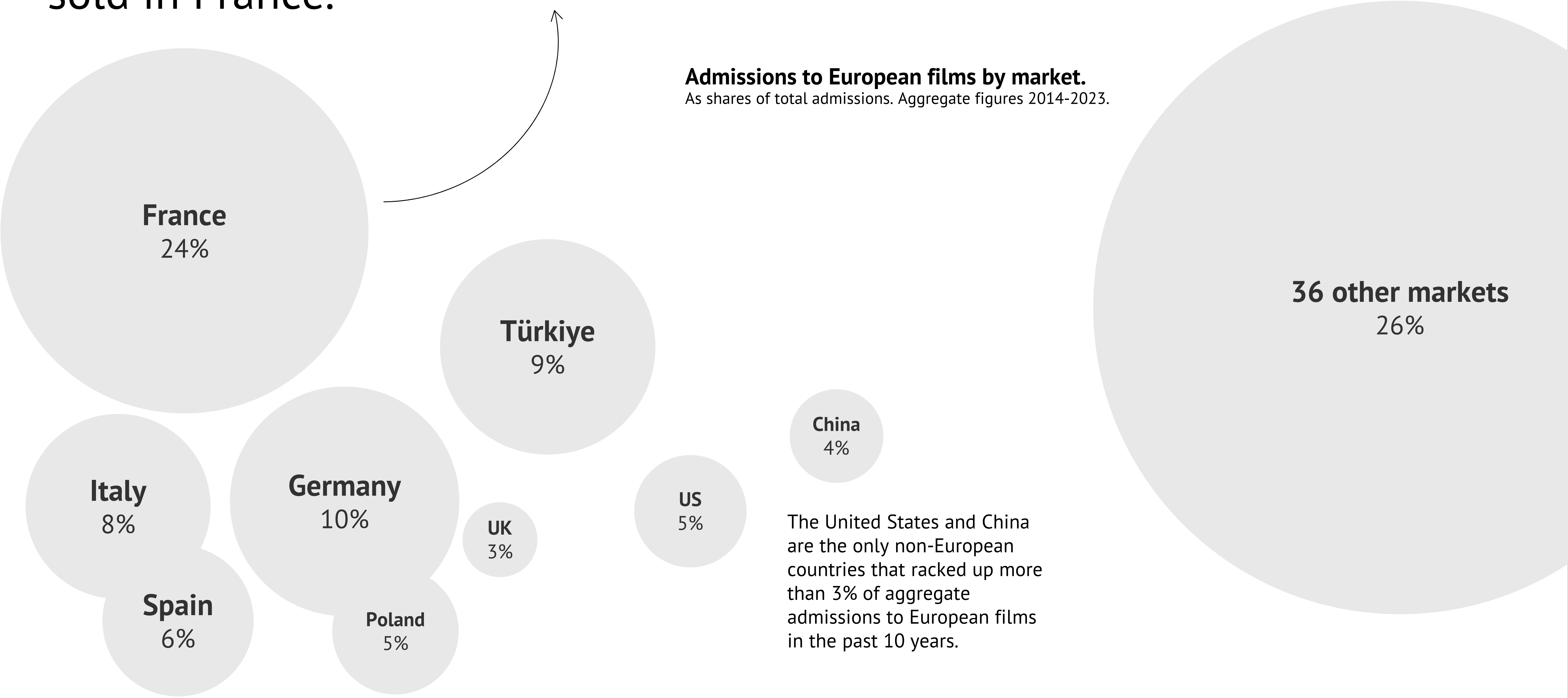
Asia 4%

North America 7%

Europe – export 74%

Figures were retrieved from admissions data for 45 markets worldwide. Source: European Audiovisual Observatory.

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



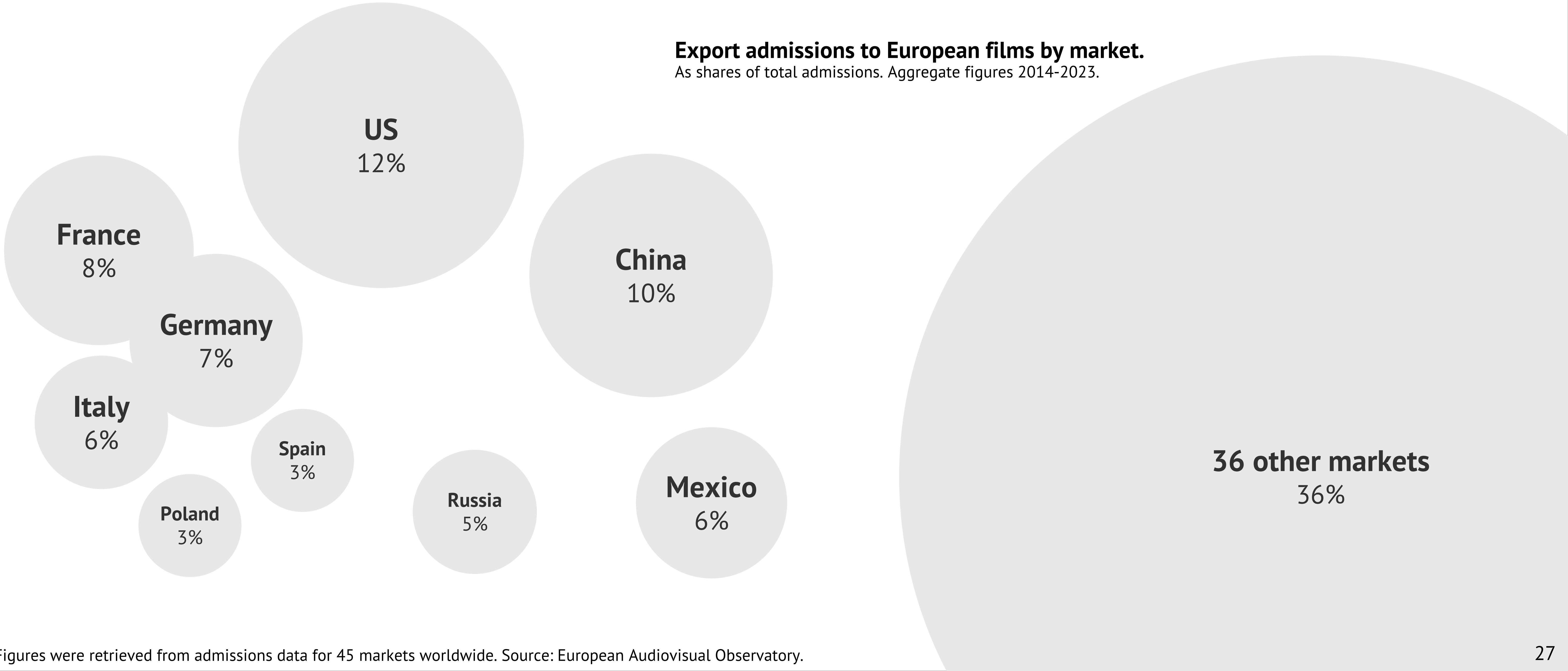
Admissions to European films by market.
As shares of total admissions. Aggregate figures 2014-2023.

The United States and China are the only non-European countries that racked up more than 3% of aggregate admissions to European films in the past 10 years.

Figures were retrieved from admissions data for 45 markets worldwide. Source: European Audiovisual Observatory.

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

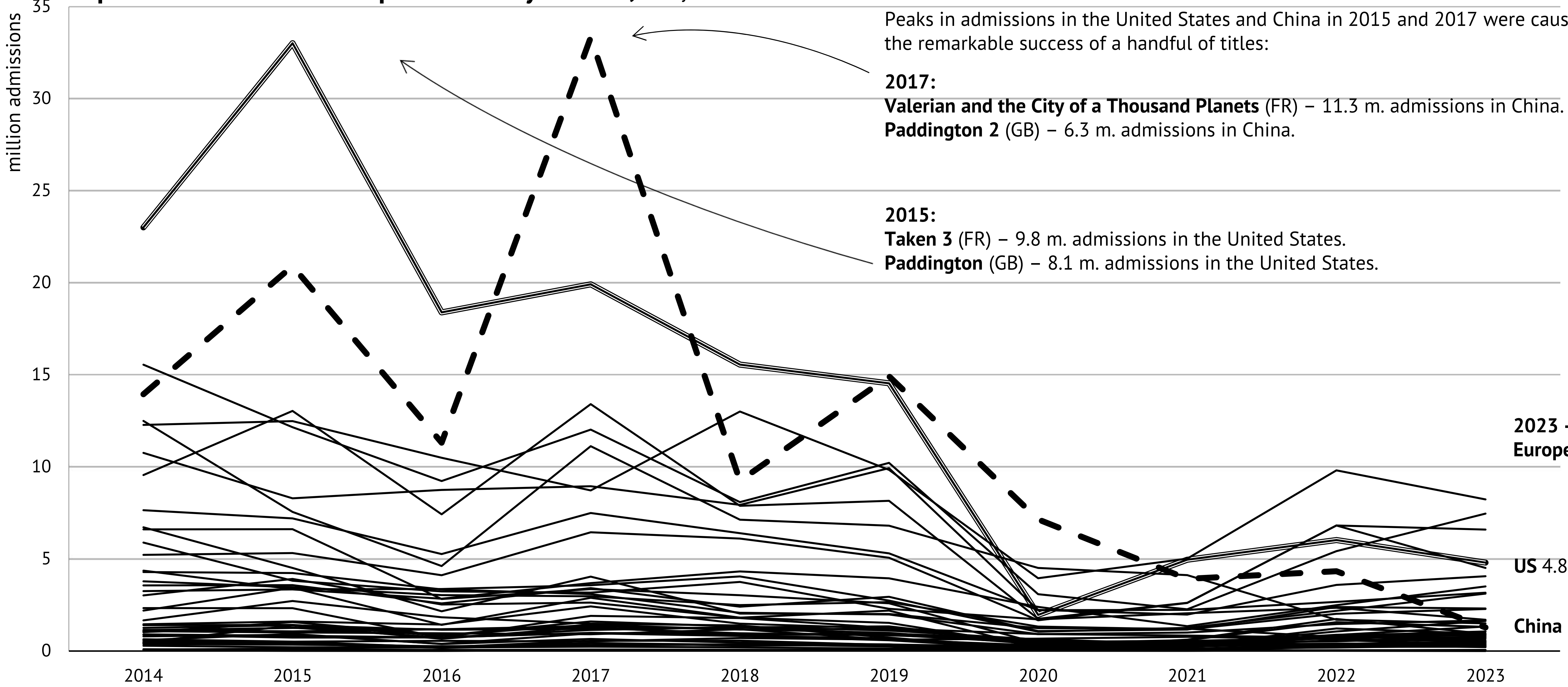
Export admissions to European films by market.
As shares of total admissions. Aggregate figures 2014-2023.



Figures were retrieved from admissions data for 45 markets worldwide. Source: European Audiovisual Observatory.

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

Export admissions to European films by market, and year. In millions.



Peaks in admissions in the United States and China in 2015 and 2017 were caused by the remarkable success of a handful of titles:

2017:
Valerian and the City of a Thousand Planets (FR) – 11.3 m. admissions in China.
Paddington 2 (GB) – 6.3 m. admissions in China.

2015:
Taken 3 (FR) – 9.8 m. admissions in the United States.
Paddington (GB) – 8.1 m. admissions in the United States.

2023 – Admissions to European films by market:

US 4.8 m. admissions

China 1.3 m. admissions

Figures were retrieved from admissions data for 45 markets worldwide. Source: European Audiovisual Observatory.

04

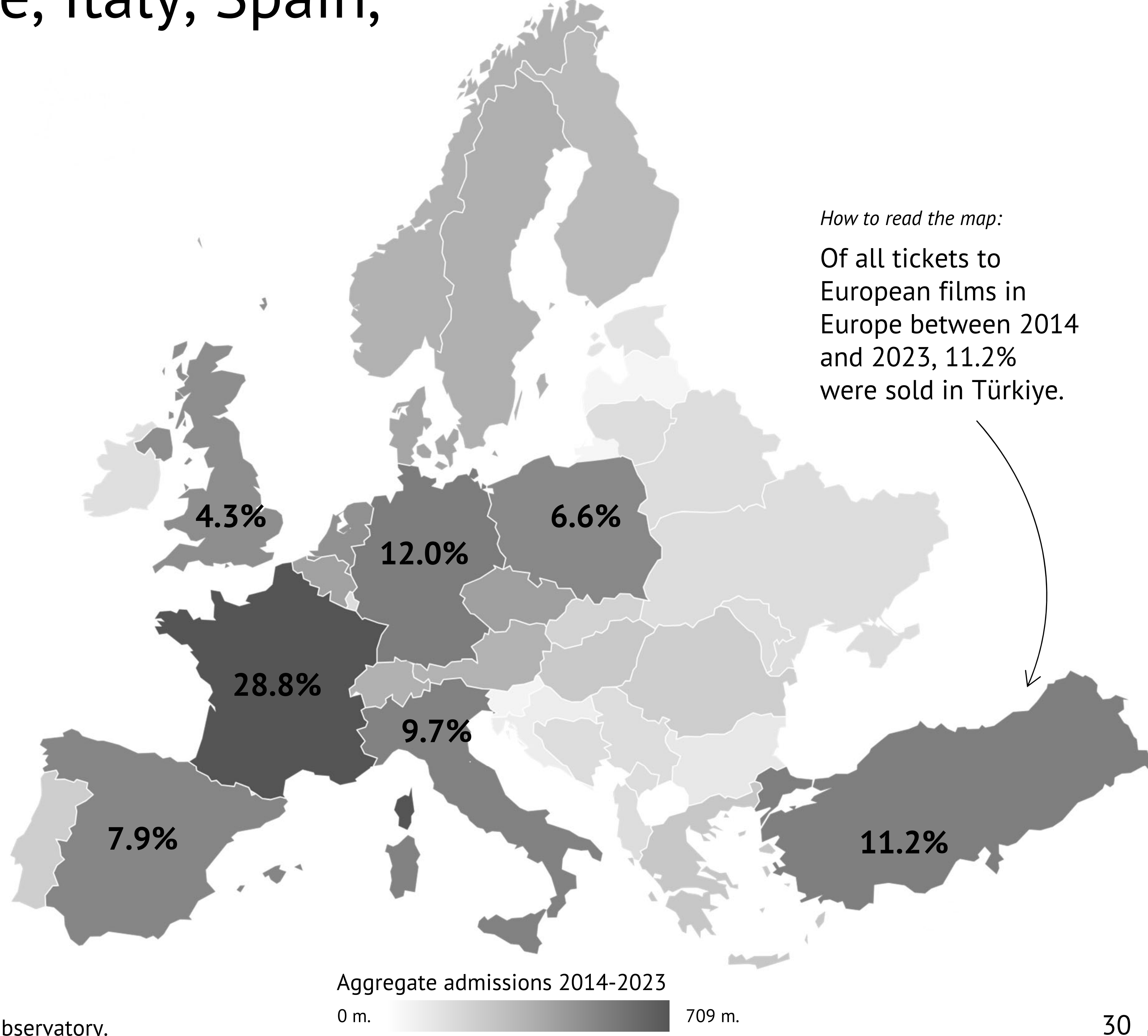
Market focus: Europe

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



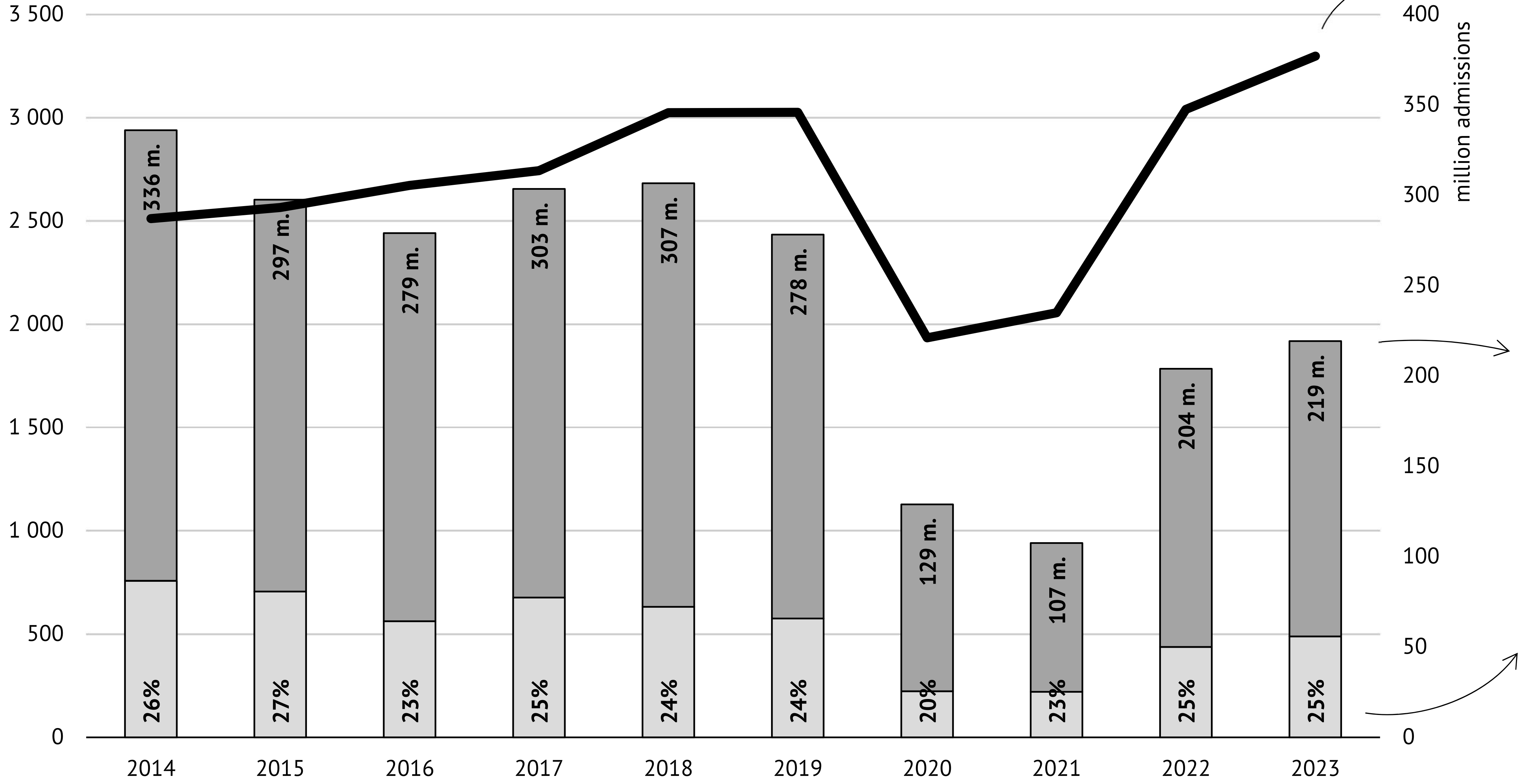
How to read the map:

Of all tickets to European films in Europe between 2014 and 2023, 11.2% were sold in Türkiye.

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).

Admissions to European films and number of films in circulation in Europe, by year.



The **number of European films** on release reached

3 000

in the last two years, reaching a new record high of 3 298 in 2023.

Admissions reached a new 4-year high but remained significantly lower than any year between 2014 and 2019.

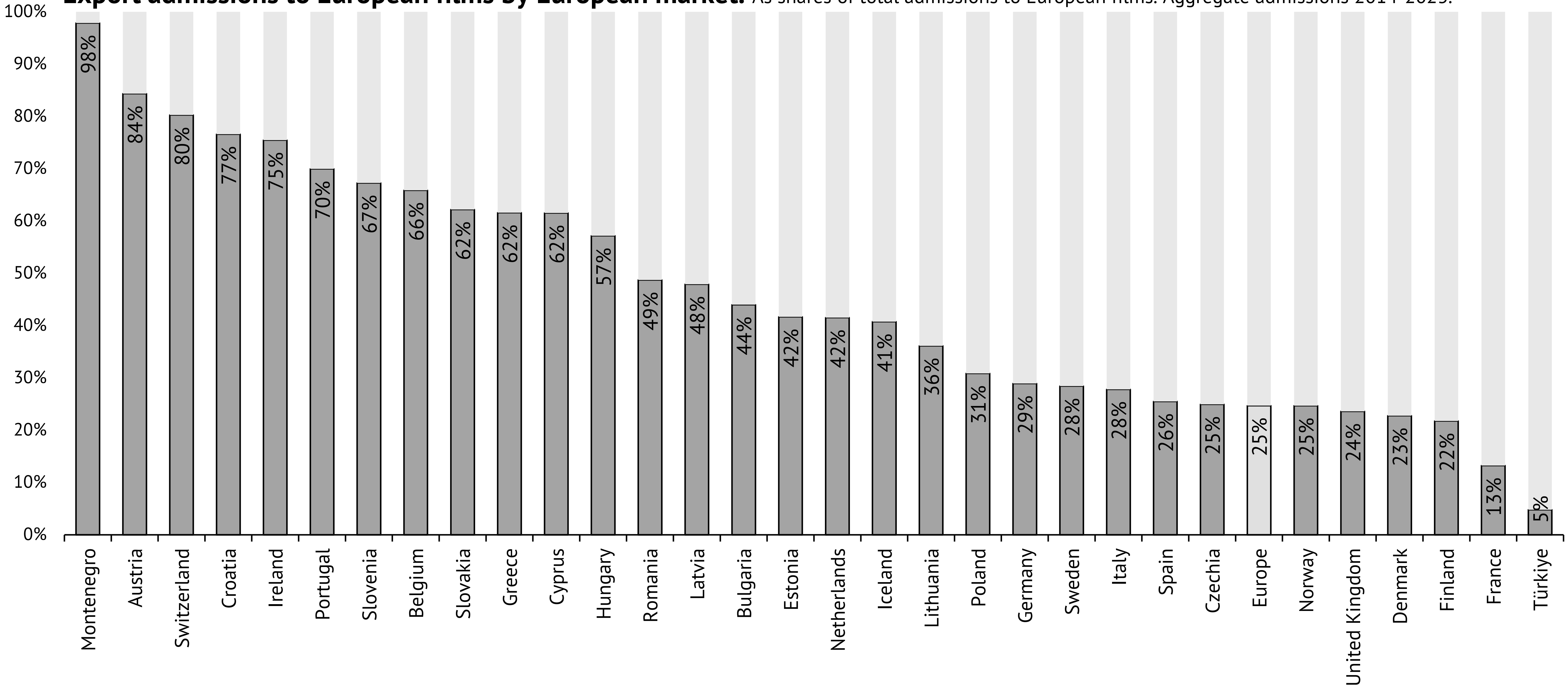
The **share of export admissions** has remained stable through the years, at an average of

24%.

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.

Export admissions to European films by European market. As shares of total admissions to European films. Aggregate admissions 2014-2023.



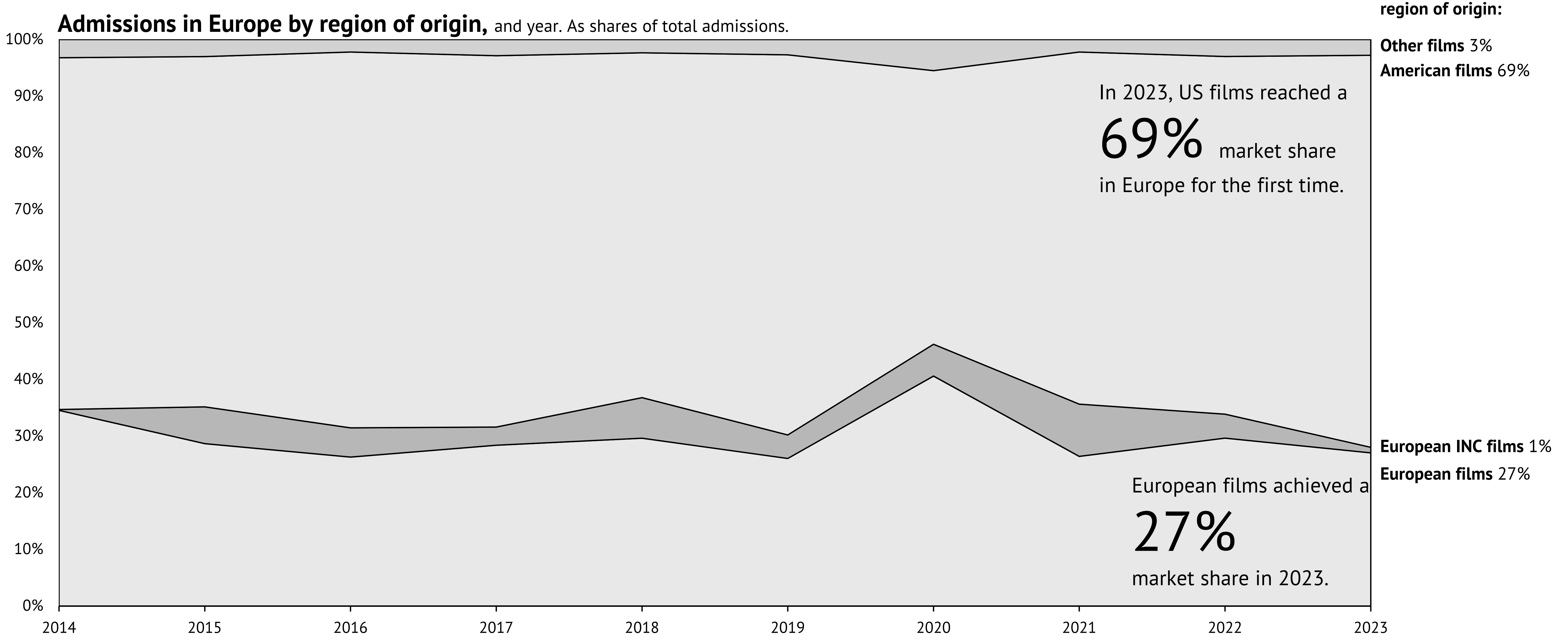
In France and Türkiye, less than

15%

of admissions to European films are sold for non-national titles.

Figures were retrieved from admissions data for 32 markets in Europe. Source: European Audiovisual Observatory.

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


Admissions in Europe by region of origin, and year. As shares of total admissions.

2023 – Market shares by region of origin:

Other films 3%

American films 69%

European INC films 1%

European films 27%

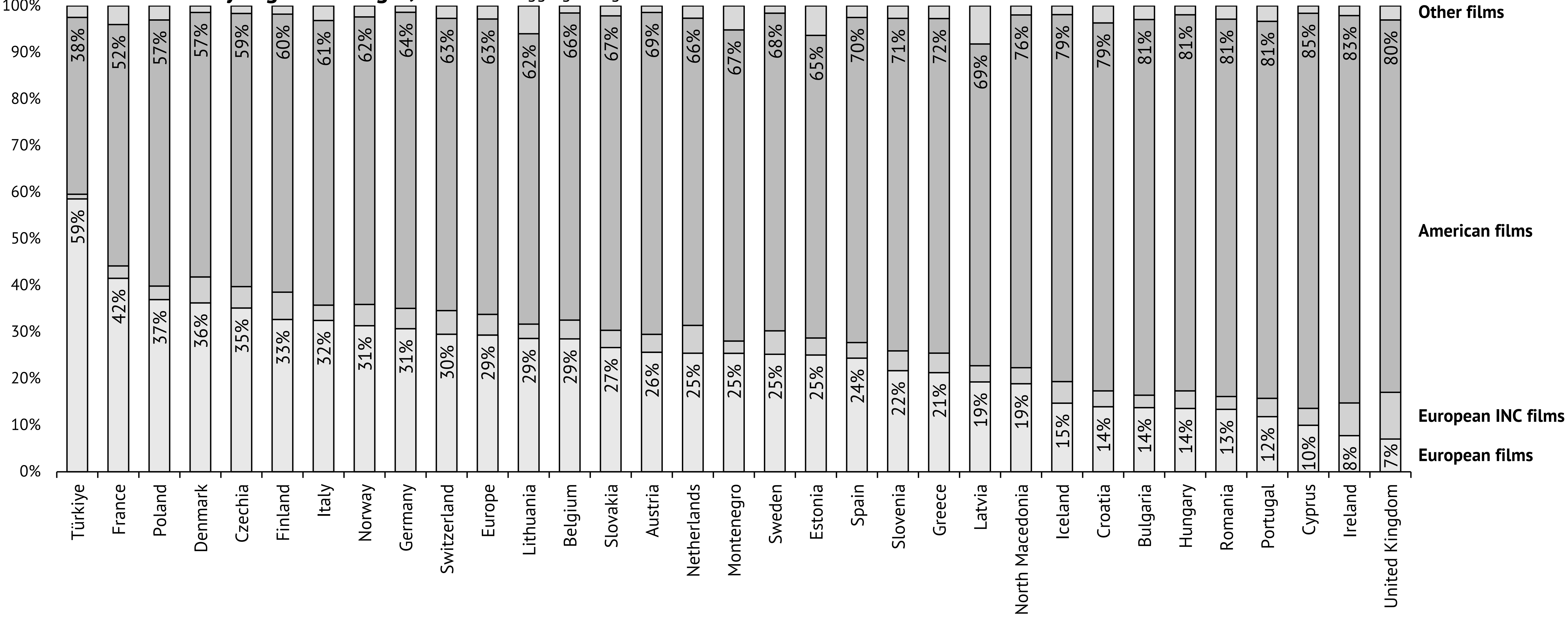
In 2023, US films reached a 69% market share in Europe for the first time.

European films achieved a 27% market share in 2023.

Figures were retrieved from admissions data for 32 markets in Europe. Source: European Audiovisual Observatory.

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.

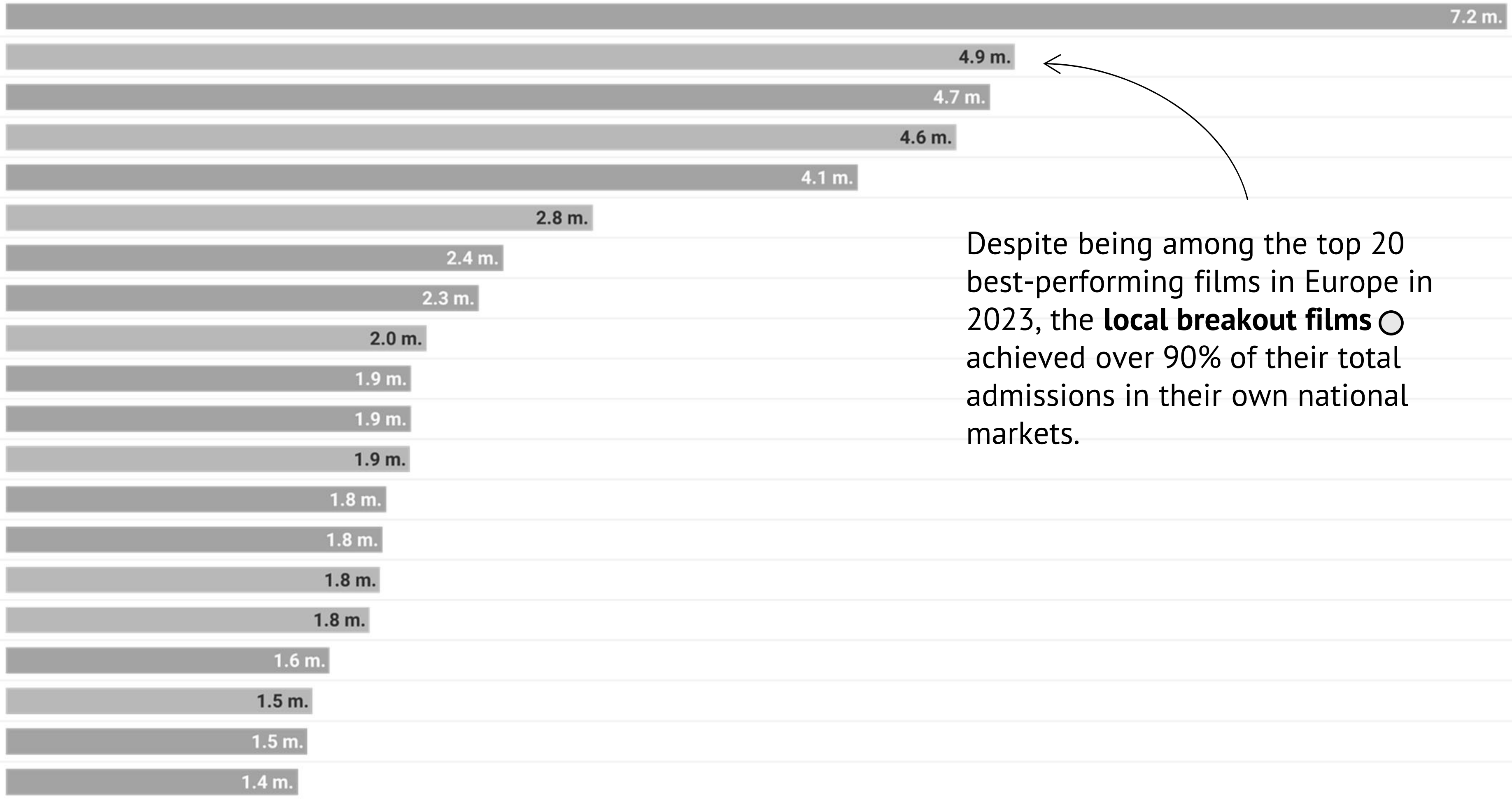
Market shares by region of origin, and market. Aggregate figures 2014-2023.



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.



1	**Astérix & Obélix: L'empire du milieu**	● *G. Canet | 2023*		7.2 m.
2	**C'è ancora domani**	● *P. Cortellesi | 2023*	○	4.9 m.
3	**Miraculous: Le film**	● *J. Zag | 2023*		4.7 m.
4	**Alibi.com 2**	● *P. Lacheau | 2023*	○	4.6 m.
5	**Les trois mousquetaires: D'Artagnan**	● *M. Bourboulon | 2023*		4.1 m.
6	**Rafadan Tayfa Galaktik Tayfa**	● *İ. Fidan | 2023*	○	2.8 m.
7	**Anatomie d'une chute**	● *J. Triet | 2023*		2.4 m.
8	**Mavka: the Forest Song**	● *O. Malamuzh, O. Ruban | 2023*		2.3 m.
9	**3 jours max**	● *T. Boudali | 2023*	○	2.0 m.
10	**The Amazing Maurice**	● *T. Genkel, F. Westermann | 2022*		1.9 m.
11	**Pattie et la colère de Poséidon**	● *D. Alaux, E. Tosti, J. Tosti | 2022*		1.9 m.
12	**Campeonex**	● *J. Fesser | 2023*	○	1.9 m.
13	**Rehragout-Rendezvous**	● *E. Herzog | 2023*		1.8 m.
14	**Die drei ??? - Erbe des Drachen**	● *T. Dünschede | 2023*		1.8 m.
15	**Chłopi**	● *D. Kobiela, H. Welchman | 2023*	○	1.8 m.
16	**Les trois mousquetaires: Milady**	● *M. Bourboulon | 2023*	○	1.8 m.
17	**Mon crime**	● *F. Ozon | 2023*		1.6 m.
18	**Ölümlü Dünya 2**	● *A. Atay | 2023*	○	1.5 m.
19	**Jeanne du Barry**	● *Maïwenn | 2023*		1.5 m.
20	**Le otto montagne**	● *F. Van Groeningen, C. Vandermeersch | 2022*		1.4 m.

Despite being among the top 20 best-performing films in Europe in 2023, the **local breakout films** ○ achieved over 90% of their total admissions in their own national markets.

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%

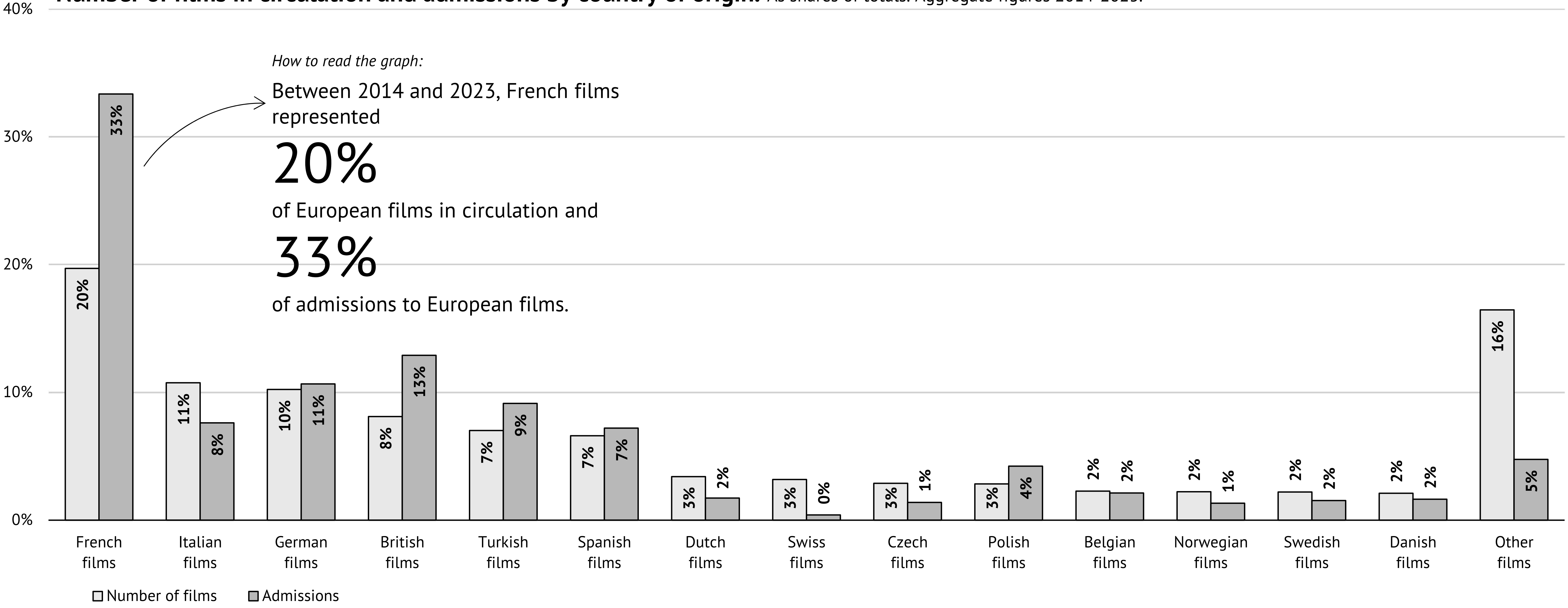
Average number of exploitation markets by country of origin:

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

Figures were retrieved from admissions data for 53 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.

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

Number of films in circulation and admissions by country of origin. As shares of totals. Aggregate figures 2014-2023.



How to read the graph:

Between 2014 and 2023, French films represented

20%

of European films in circulation and

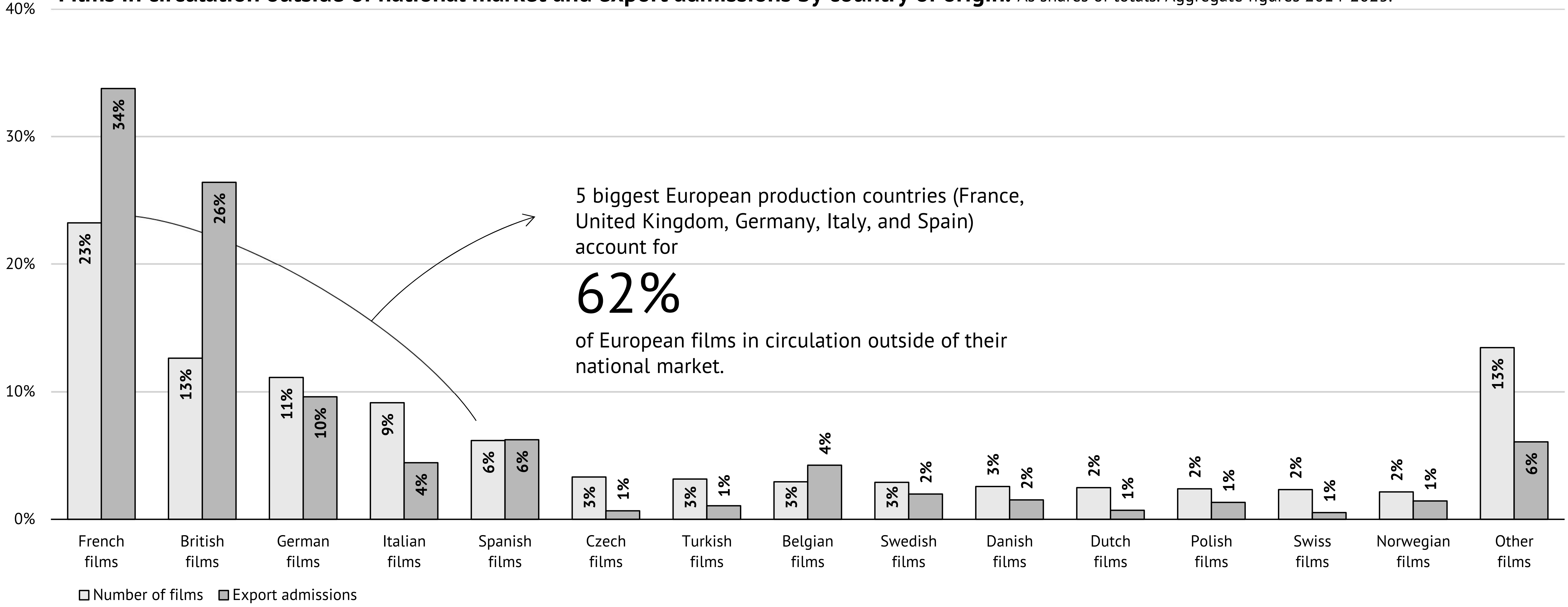
33%

of 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 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.

Films in circulation outside of national market and export admissions by country of origin. As shares of totals. Aggregate figures 2014-2023.



5 biggest European production countries (France, United Kingdom, Germany, Italy, and Spain) account for

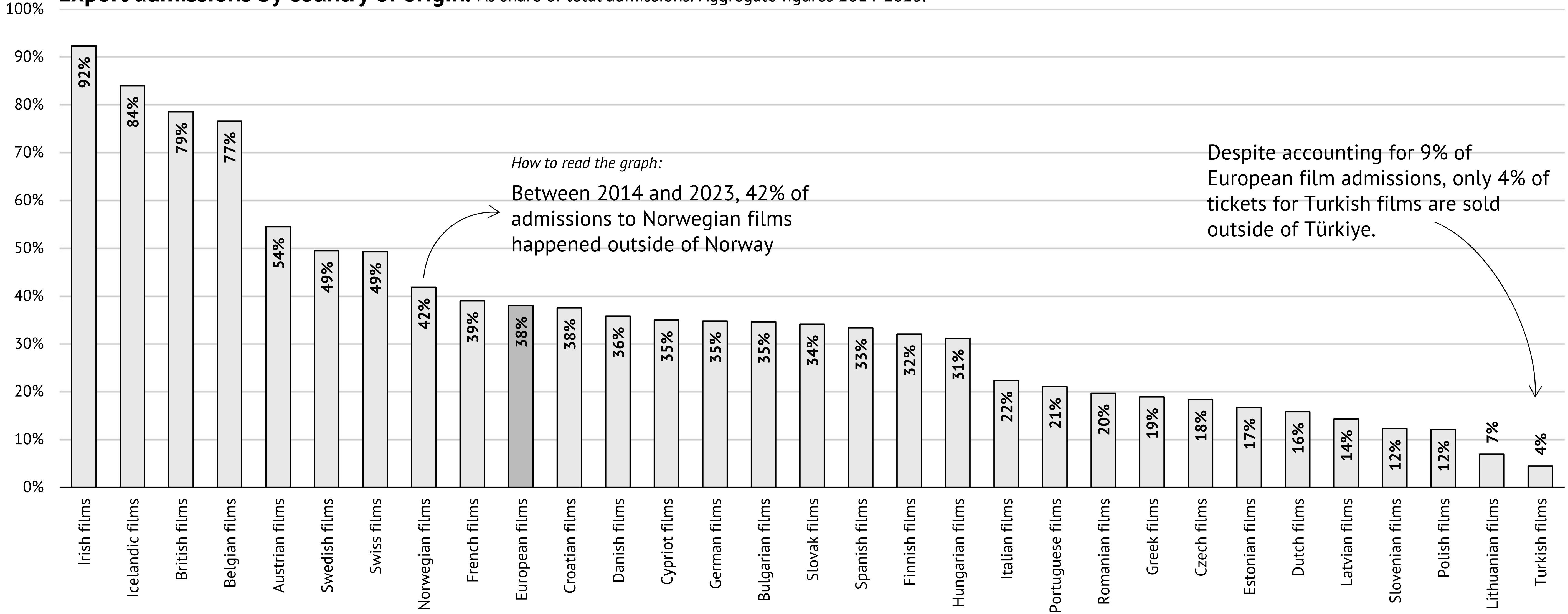
62%

of European films in circulation outside of their national market.

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.

Export admissions by country of origin. As share of total admissions. Aggregate figures 2014-2023.



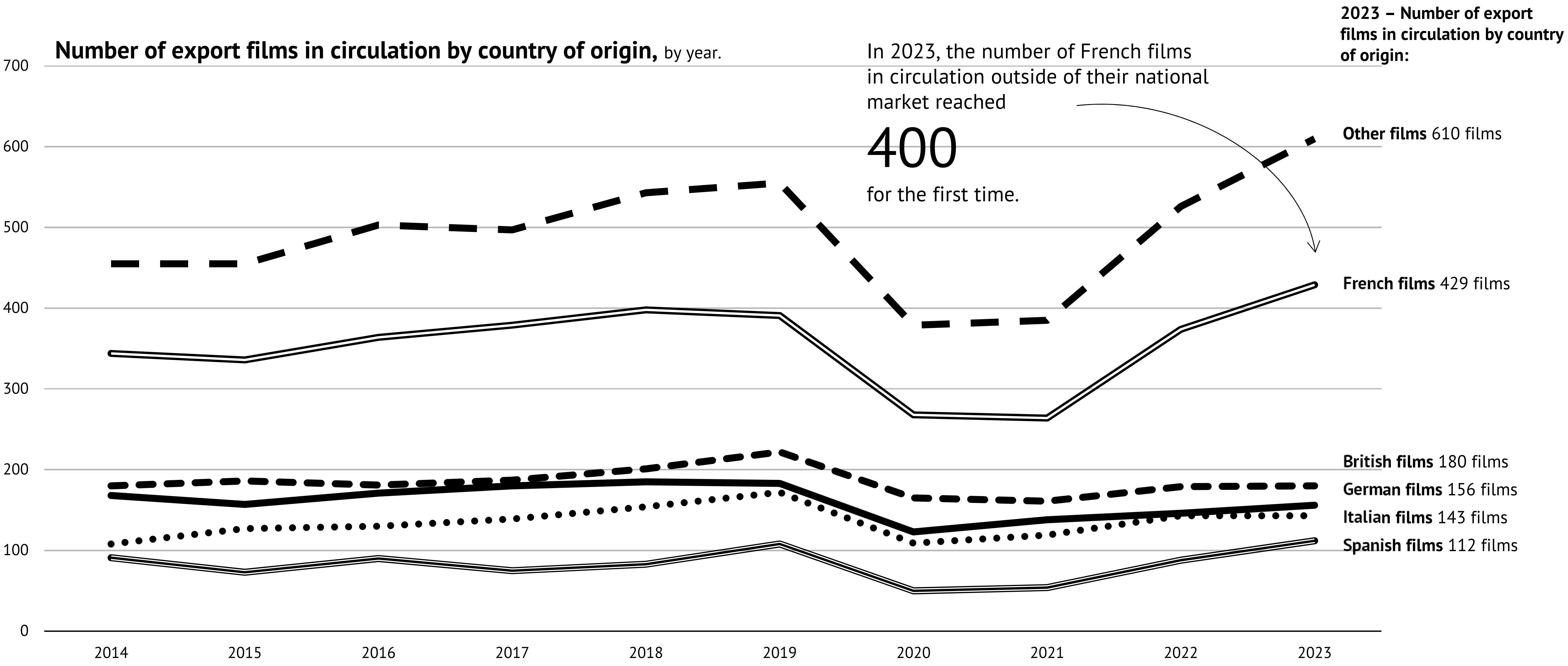
How to read the graph:

Between 2014 and 2023, 42% of admissions to Norwegian films happened outside of Norway

Despite accounting for 9% of European film admissions, only 4% of tickets for Turkish films are sold outside of Türkiye.

Figures were retrieved from admissions data for 45 markets worldwide. Source: European Audiovisual Observatory.

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



Number of export films in circulation by country of origin, by year.

In 2023, the number of French films in circulation outside of their national market reached

400

for the first time.

2023 – Number of export films in circulation by country of origin:

Other films 610 films

French films 429 films

British films 180 films

German films 156 films

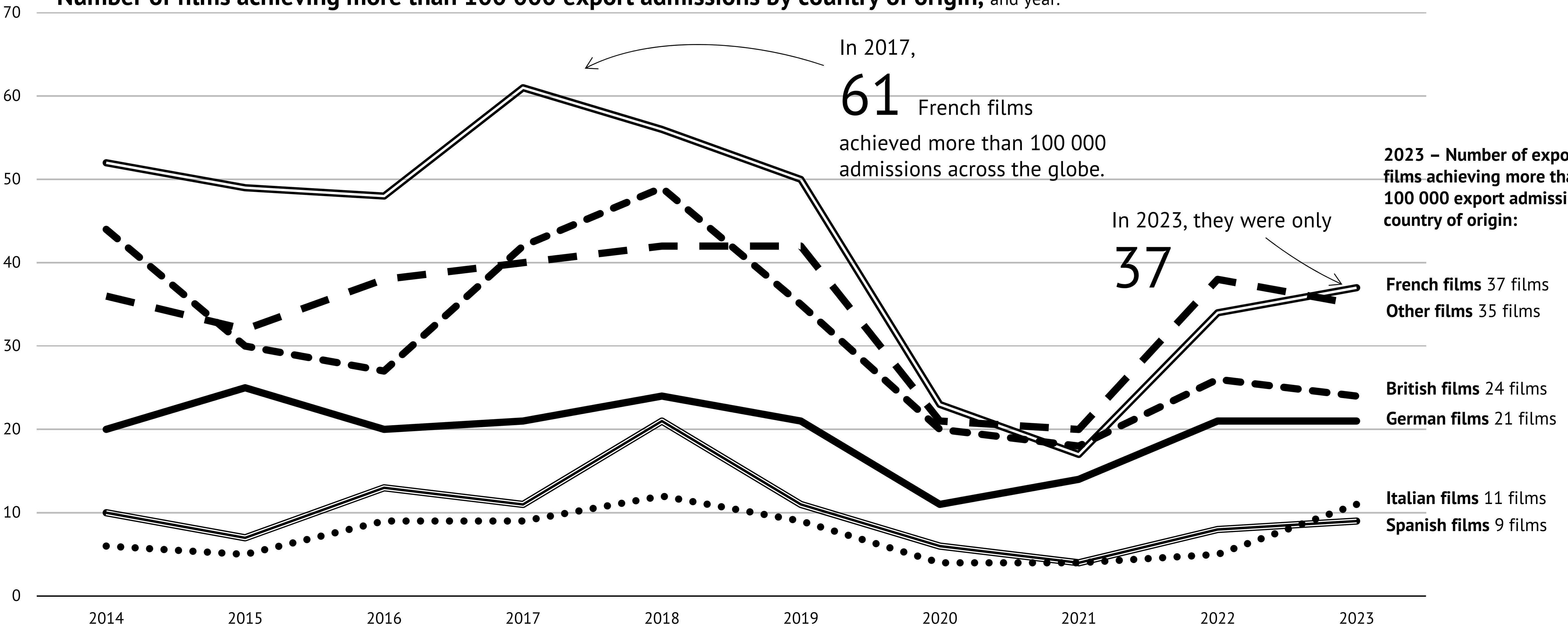
Italian films 143 films

Spanish films 112 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.

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

Number of films achieving more than 100 000 export admissions by country of origin, and year.

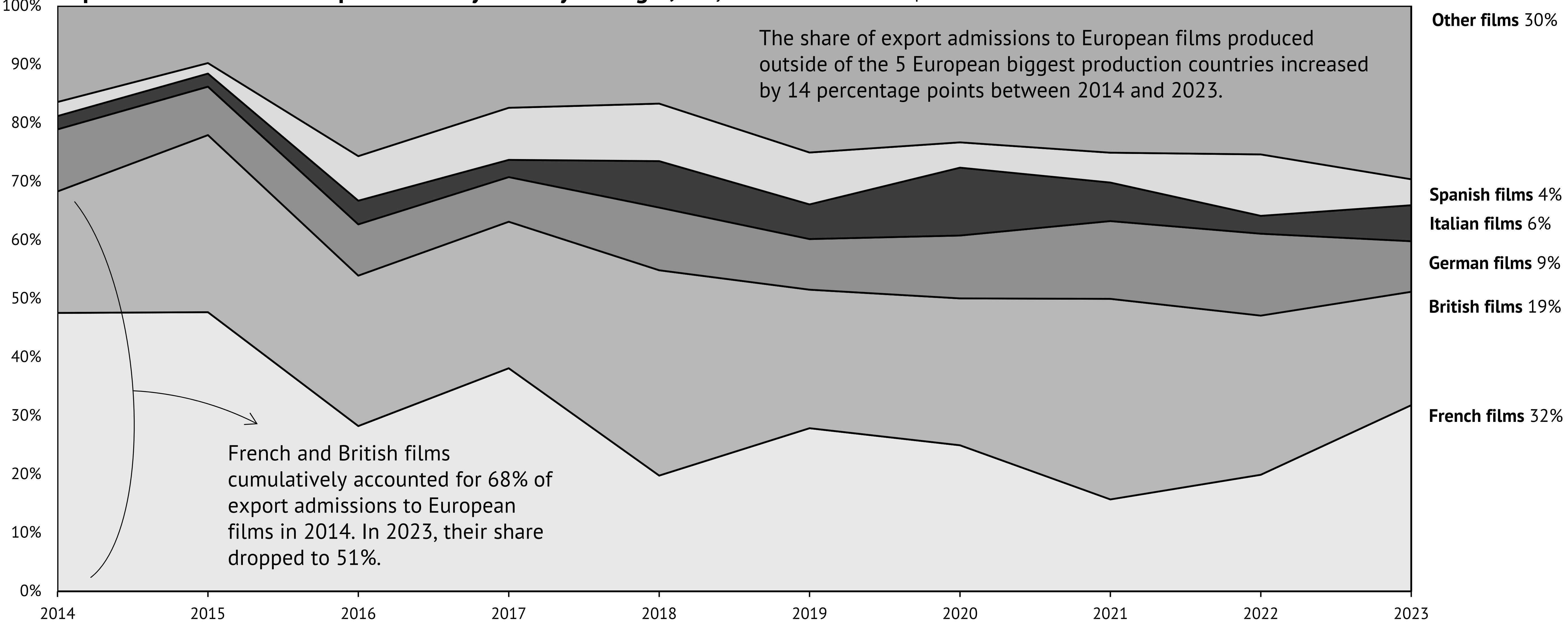


Figures were retrieved from admissions data for 45 markets worldwide. For data on the number of films in circulation, only films that achieved at least 1 000 aggregate export admissions were included.
Source: European Audiovisual Observatory.

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

Export admissions to European films by country of origin, and year. As shares of total export admissions.

2023 – Share of export admissions by country of origin:



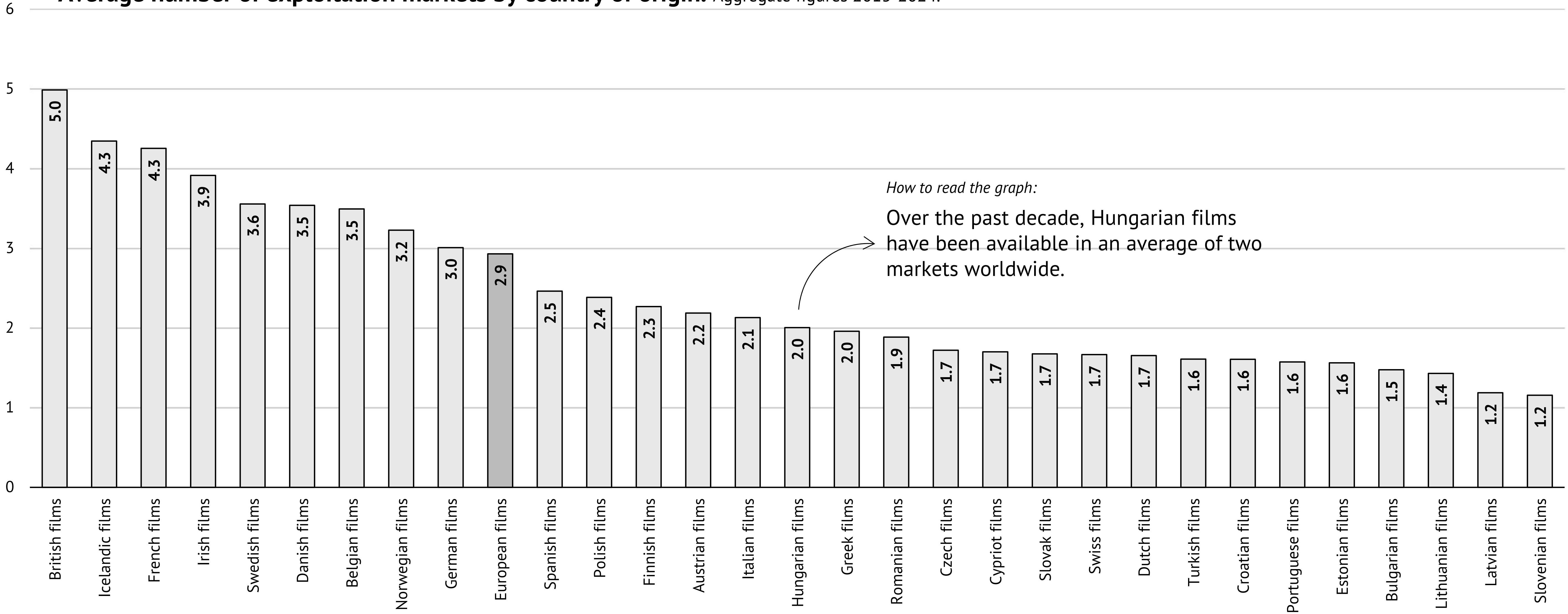
The share of export admissions to European films produced outside of the 5 European biggest production countries increased by 14 percentage points between 2014 and 2023.

French and British films cumulatively accounted for 68% of export admissions to European films in 2014. In 2023, their share dropped to 51%.

Figures were retrieved from admissions data for 45 markets worldwide. Source: European Audiovisual Observatory.

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.

Average number of exploitation markets by country of origin. Aggregate figures 2013-2024.



How to read the graph:

Over the past decade, Hungarian films have been available in an average of two markets worldwide.

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.

06

Top films and genres

Key 2023 figures

Top European film by total admissions:

Astérix & Obélix: L'empire du milieu
FR / 2023 / Guillaume Canet – 7.2 m. admissions worldwide

Top European film by export admissions:

Miraculous: Le film
FR / 2023 / Jeremy Zag – 3.6 m. admissions worldwide

17%

Share of admissions of the top 10 European films in 2023
+0.8 percentage points compared to 2022

26%

Share of admissions of the top 10 export European films in 2023
-5.2 percentage points compared to 2022

52%

Share of admissions of the top 100 European films in 2023
+0.2 percentage points compared to 2022

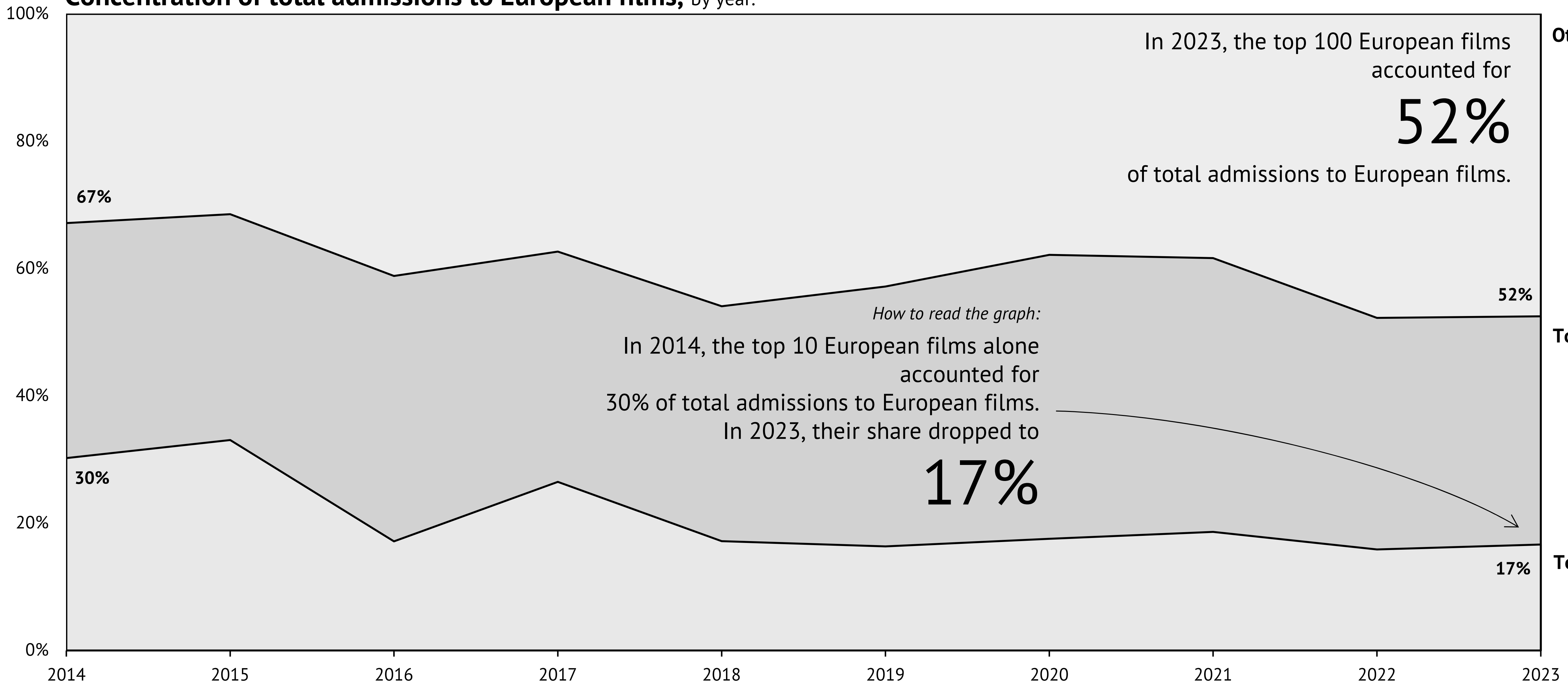
69%

Share of admissions of the top 100 export European films in 2023
-2.1 percentage points compared to 2022

Figures were retrieved from admissions data for 53 markets worldwide. Source: European Audiovisual Observatory.

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

Concentration of total admissions to European films, by year.



In 2023, the top 100 European films accounted for

52%

of total admissions to European films.

How to read the graph:

In 2014, the top 10 European films alone accounted for 30% of total admissions to European films. In 2023, their share dropped to

17%

2023 – Market shares by top films:

Other films 48%

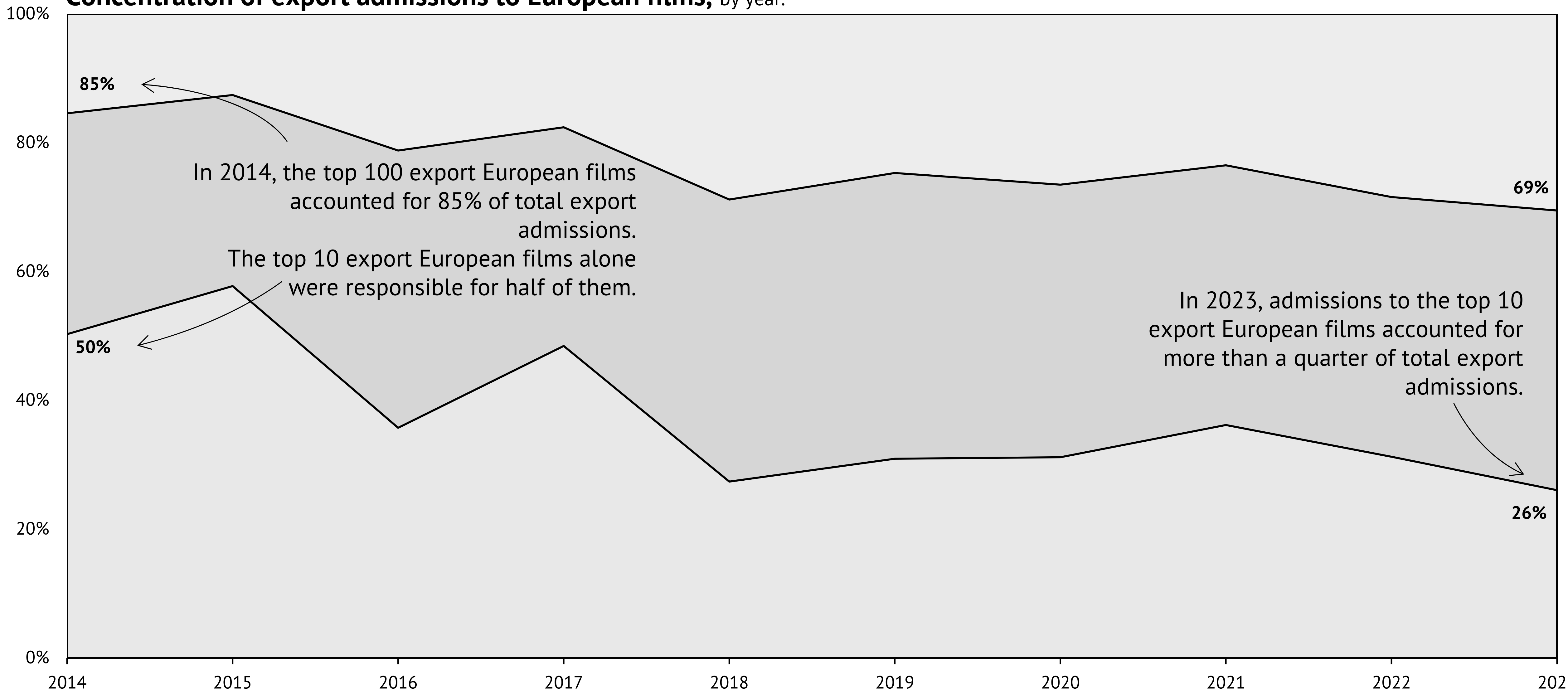
Top 100 films 52%

Top 10 films 17%

Figures were retrieved from admissions data for 45 markets worldwide. Source: European Audiovisual Observatory.

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

Concentration of export admissions to European films, by year.



In 2014, the top 100 export European films accounted for 85% of total export admissions.
The top 10 export European films alone were responsible for half of them.

In 2023, admissions to the top 10 export European films accounted for more than a quarter of total export admissions.

2023 – Market shares by top films (export admissions only):

Other films 31%

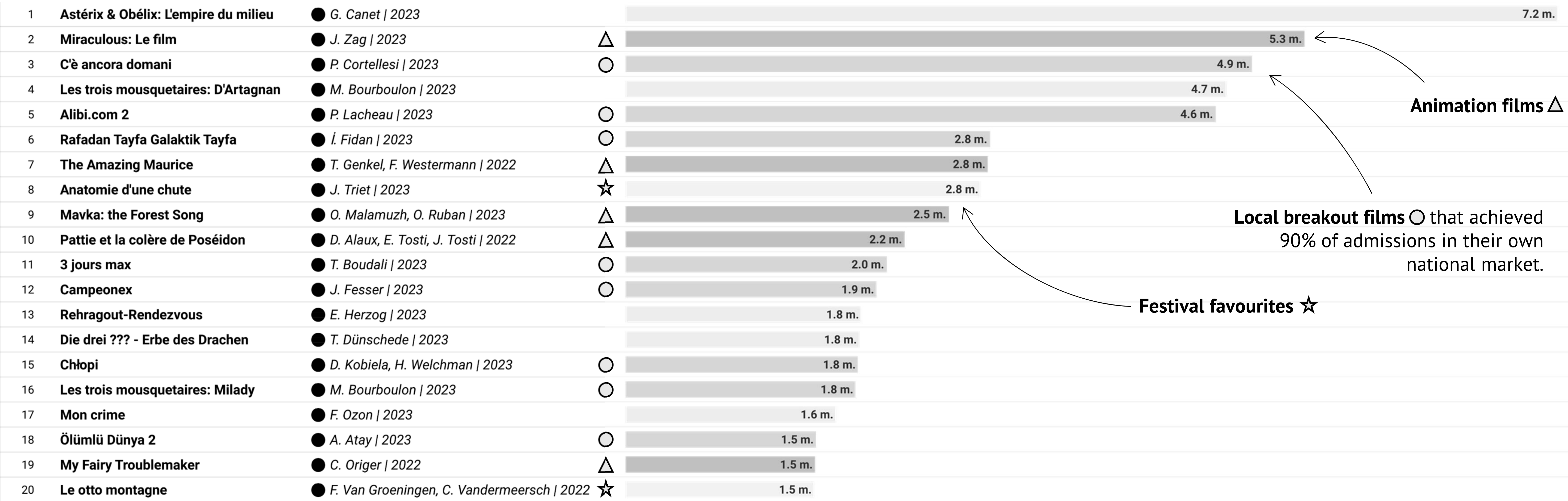
Top 100 films 69%

Top 10 films 26%

Figures were retrieved from admissions data for 45 markets worldwide. Source: European Audiovisual Observatory.

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.



Animation films △

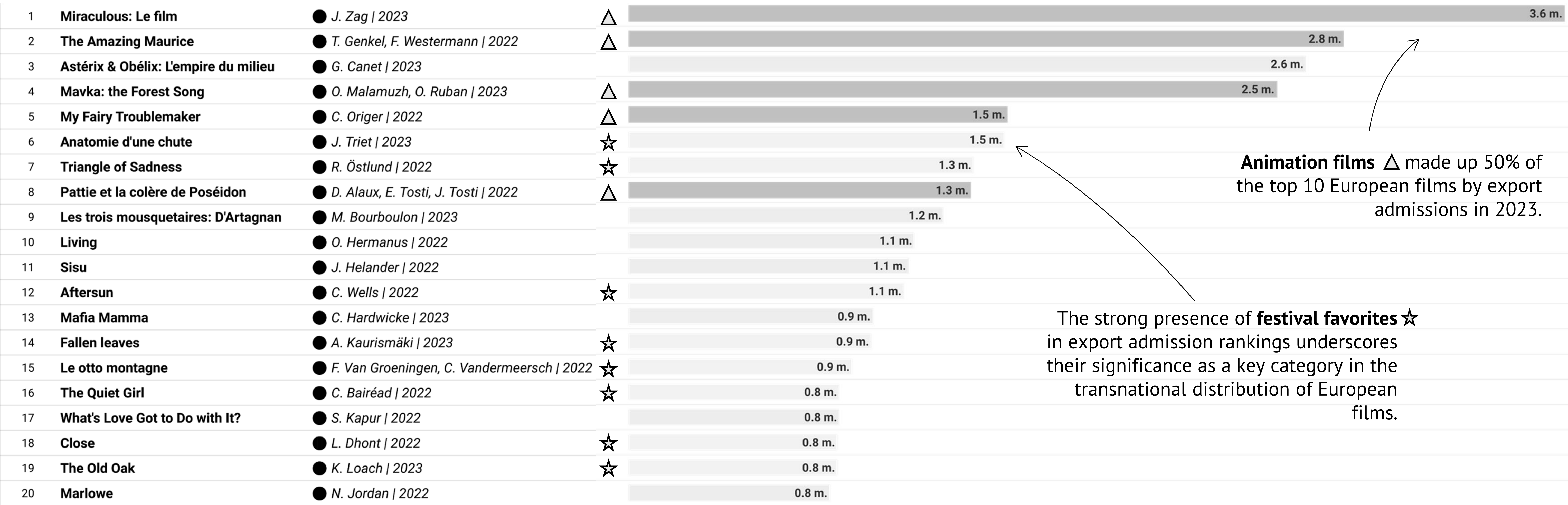
Local breakout films ○ that achieved 90% of admissions in their own national market.

Festival favourites ☆

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.



1	**Miraculous: Le film**	● *J. Zag | 2023*	△	3.6 m.
2	**The Amazing Maurice**	● *T. Genkel, F. Westermann | 2022*	△	2.8 m.
3	**Astérix & Obélix: L'empire du milieu**	● *G. Canet | 2023*		2.6 m.
4	**Mavka: the Forest Song**	● *O. Malamuzh, O. Ruban | 2023*	△	2.5 m.
5	**My Fairy Troublemaker**	● *C. Origer | 2022*	△	1.5 m.
6	**Anatomie d'une chute**	● *J. Triet | 2023*	☆	1.5 m.
7	**Triangle of Sadness**	● *R. Östlund | 2022*	☆	1.3 m.
8	**Pattie et la colère de Poséidon**	● *D. Alaux, E. Tosti, J. Tosti | 2022*	△	1.3 m.
9	**Les trois mousquetaires: D'Artagnan**	● *M. Bourboulon | 2023*		1.2 m.
10	**Living**	● *O. Hermanus | 2022*		1.1 m.
11	**Sisu**	● *J. Helander | 2022*		1.1 m.
12	**Aftersun**	● *C. Wells | 2022*	☆	1.1 m.
13	**Mafia Mamma**	● *C. Hardwicke | 2023*		0.9 m.
14	**Fallen leaves**	● *A. Kaurismäki | 2023*	☆	0.9 m.
15	**Le otto montagne**	● *F. Van Groeningen, C. Vandermeersch | 2022*	☆	0.9 m.
16	**The Quiet Girl**	● *C. Bairéad | 2022*	☆	0.8 m.
17	**What's Love Got to Do with It?**	● *S. Kapur | 2022*		0.8 m.
18	**Close**	● *L. Dhont | 2022*	☆	0.8 m.
19	**The Old Oak**	● *K. Loach | 2023*	☆	0.8 m.
20	**Marlowe**	● *N. Jordan | 2022*		0.8 m.

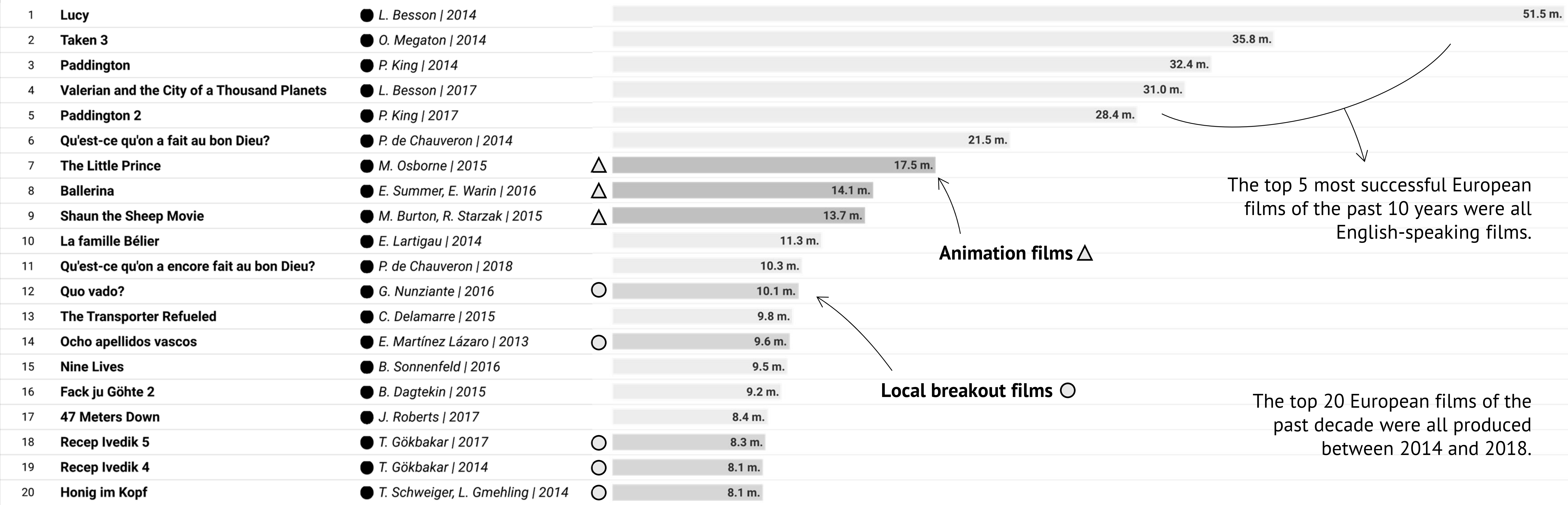
Animation films △ made up 50% of the top 10 European films by export admissions in 2023.

The strong presence of **festival favorites** ☆ in export admission rankings underscores their significance as a key category in the transnational distribution of European films.

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.



1	**Lucy**	● *L. Besson | 2014*		51.5 m.
2	**Taken 3**	● *O. Megaton | 2014*		35.8 m.
3	**Paddington**	● *P. King | 2014*		32.4 m.
4	**Valerian and the City of a Thousand Planets**	● *L. Besson | 2017*		31.0 m.
5	**Paddington 2**	● *P. King | 2017*		28.4 m.
6	**Qu'est-ce qu'on a fait au bon Dieu?**	● *P. de Chauveron | 2014*		21.5 m.
7	**The Little Prince**	● *M. Osborne | 2015*	△	17.5 m.
8	**Ballerina**	● *E. Summer, E. Warin | 2016*	△	14.1 m.
9	**Shaun the Sheep Movie**	● *M. Burton, R. Starzak | 2015*	△	13.7 m.
10	**La famille Bélier**	● *E. Lartigau | 2014*		11.3 m.
11	**Qu'est-ce qu'on a encore fait au bon Dieu?**	● *P. de Chauveron | 2018*		10.3 m.
12	**Quo vado?**	● *G. Nunziante | 2016*	○	10.1 m.
13	**The Transporter Refueled**	● *C. Delamarre | 2015*		9.8 m.
14	**Ocho apellidos vascos**	● *E. Martínez Lázaro | 2013*	○	9.6 m.
15	**Nine Lives**	● *B. Sonnenfeld | 2016*		9.5 m.
16	**Fack ju Göhte 2**	● *B. Dagtekin | 2015*		9.2 m.
17	**47 Meters Down**	● *J. Roberts | 2017*		8.4 m.
18	**Recep Ivedik 5**	● *T. Gökbakar | 2017*	○	8.3 m.
19	**Recep Ivedik 4**	● *T. Gökbakar | 2014*	○	8.1 m.
20	**Honig im Kopf**	● *T. Schweiger, L. Gmehling | 2014*	○	8.1 m.

The top 5 most successful European films of the past 10 years were all English-speaking films.

Animation films △

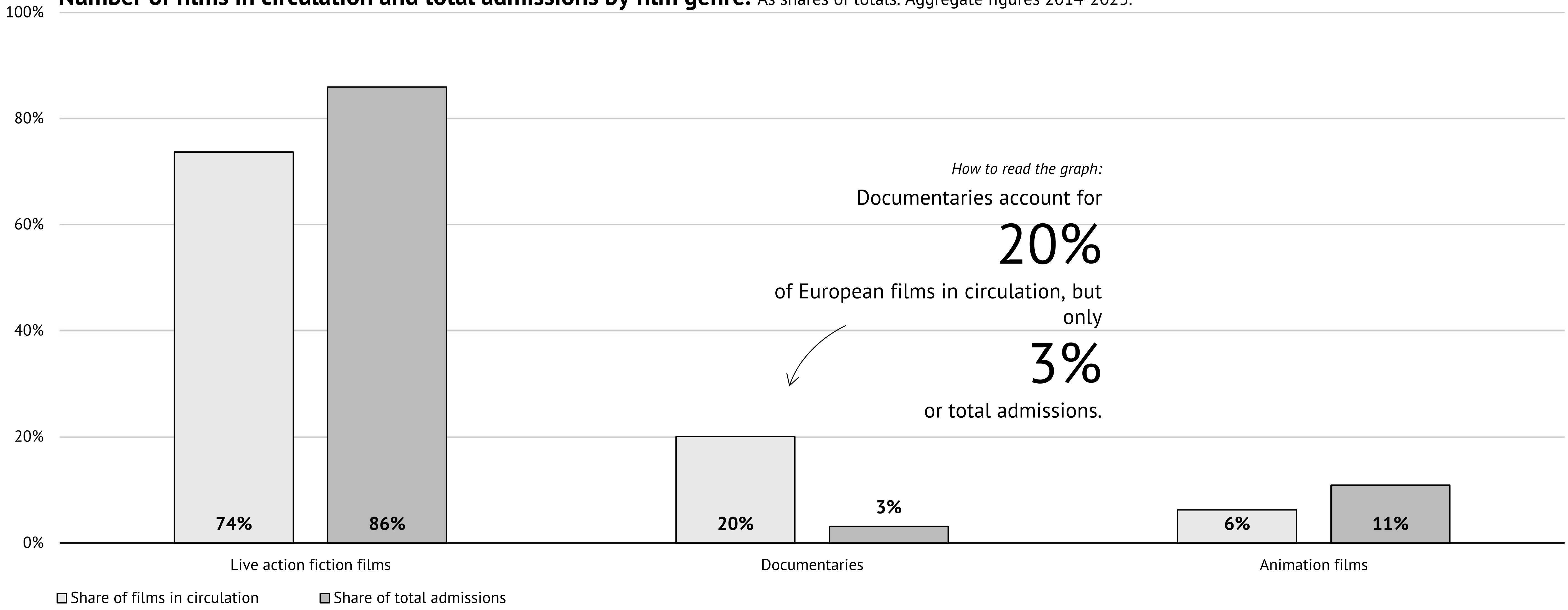
Local breakout films ○

The top 20 European films of the past decade were all produced between 2014 and 2018.

Figures were retrieved from admissions data for 45 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. Source: European Audiovisual Observatory.

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

Number of films in circulation and total admissions by film genre. As shares of totals. Aggregate figures 2014-2023.



How to read the graph:

Documentaries account for

20%

of European films in circulation, but only

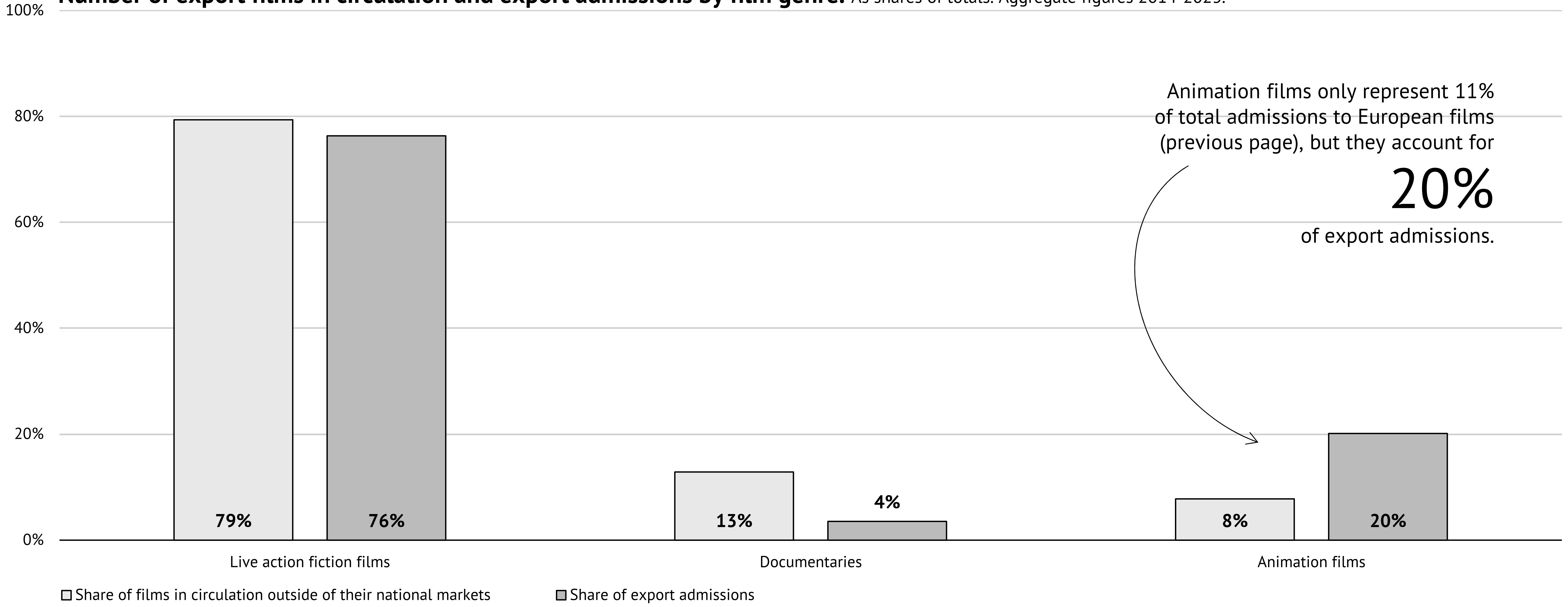
3%

or total admissions.

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.

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

Number of export films in circulation and export admissions by film genre. As shares of totals. Aggregate figures 2014-2023.



Animation films only represent 11% of total admissions to European films (previous page), but they account for

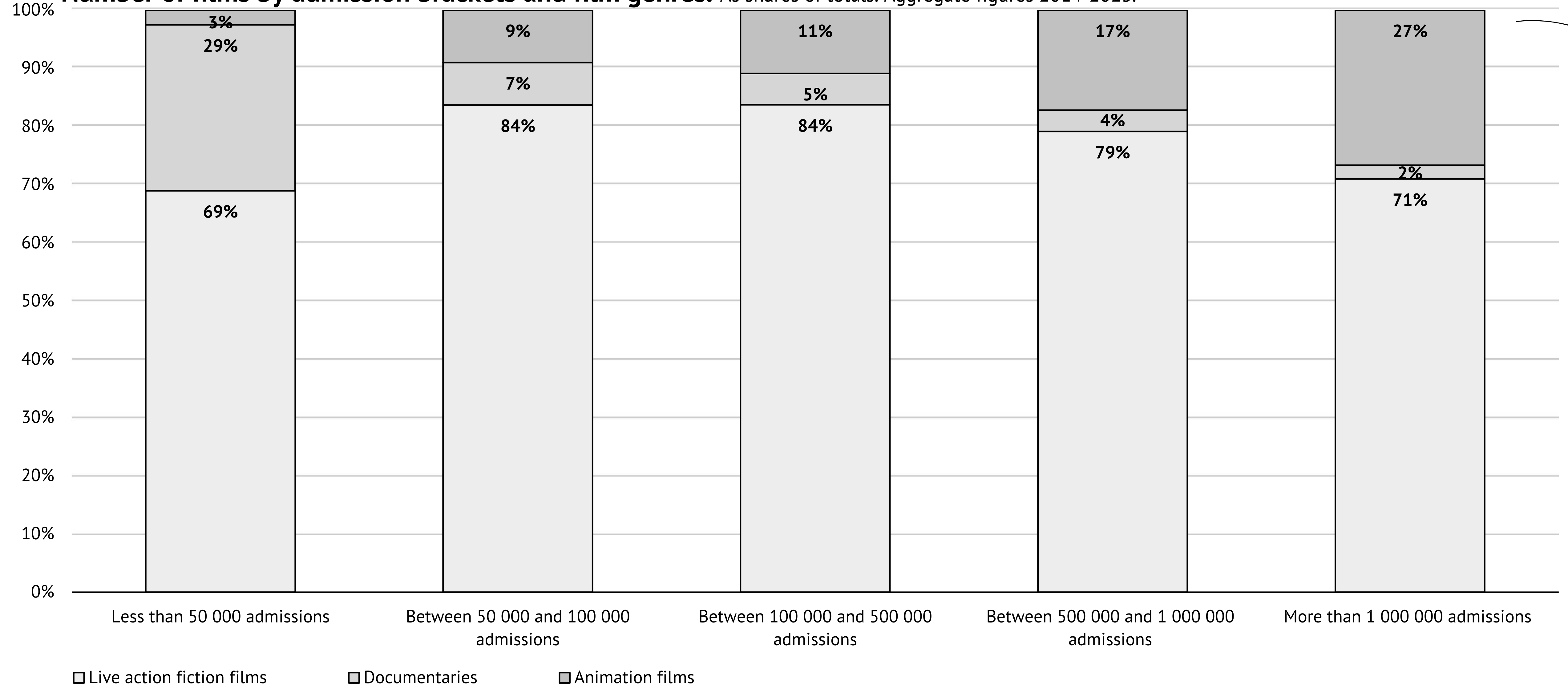
20%

of export admissions.

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 export admissions were included.
Source: European Audiovisual Observatory.

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.

Number of films by admission brackets and film genres. As shares of totals. Aggregate figures 2014-2023.



27%

of European blockbuster films are animation films.

Figures were retrieved from admissions data for 45 markets worldwide. Only films that achieved at least 1 000 aggregate admissions were included. Source: European Audiovisual Observatory.

Made in Europe

Theatrical distribution of European films across the globe 2014-2023

Author	Manuel Fioroni, manuel.fioroni@coe.int
Press and Public Relations	Alison Hindhaugh, alison.hindhaugh@coe.int
Publisher	European Audiovisual Observatory, 76, Allée de la Robertsau, 67000 Strasbourg, France +33 (0)3 90 21 60 00 www.obs.coe.int
Graphic elements	Datawrapper, Germany
Cover layout	ALTRAN, France