22nd RENDEZ-VOUS WITH FRENCH CINEMA
PARIS / JANUARY 16 - 20 2020

PERFORMANCE OF FRENCH FILMS IN FOREIGN MARKETS IN 2019
RESULTS FOR FRENCH FILMS IN INTERNATIONAL MARKETS IN 2019

40.5* MILLION ADMISSIONS
up 1.25%** compared to the provisional figure in 2018 announced in January 2019

Note: in France, French films generated 74.7 million admissions in 2019***

244.4* MILLION EUROS IN RECEIPTS
up 3.12%** compared to the provisional figure in 2018 announced in January 2019

2019, A STABLE YEAR FOR FRENCH CINEMA WORLDWIDE

- 34.4* million admissions (85% of the total) for majority-French productions (up 32.3%** compared to January 2019)
- 24* million admissions (59.2% of the total) for French language films (down 2.43%** compared to January 2019)
- 721* French films on release in foreign theaters (up 8.42%** compared to January 2019)
- 7* French films sold more than 1 million tickets abroad (1** more than in January 2019)
- 64* French films drew more than 100,000 spectators abroad (14** fewer than in January 2019)
- Figures in line with 2018
- Italy remains the leading territory in terms of admissions for French films in 2019, ahead of Germany and Spain*

Note:
* The figures given in this brochure are provisional and non-exhaustive. The definitive figures will be available in the fall and will inevitably be higher.
** This year, for greater coherence, the percentage changes have been calculated compared to the provisional 2018 figures announced in January 2019 (and not compared to the definitive 2018 figures announced in October 2019).
*** Provisional data estimated by the CNC.
A YEAR OF FRENCH CINEMA ON THE INTERNATIONAL MARKETPLACE

In 2019, French films sold 40.5 million tickets abroad and generated 244.4 million euros in box-office receipts. After a drop in 2018 to 43.7 million admissions, ticket sales for French cinema in foreign movie theaters were fairly stable, with figures close to those for 2018 published in January 2019 (40 million). Once all the figures have been consolidated, they should be in line with those for 2016 (40.7 million) and 2018 (43.7 million).

2019 was a year with a Luc Besson movie, but without the “Besson effect”: *Luc* (56 million admissions) accounted for 46.7% of total admissions in 2015, and *Valerian* (30.5 million) cornered 36.8% in 2017, whereas *Anna* (4.35 million) only accounted for 10.7% of total foreign admissions in 2019.

French-language films struggled to perform, for the first time cumulating fewer than 25 million ticket sales, for the lowest receipts since 2010. This was the result of the strong performances of *Anna* and *Mia and the White Lion*, which allowed films in a language other than French to maintain the same level as in 2018. However, the share of French-language films exceeded 50% of the annual total, whereas traditionally it slipped below this benchmark whenever a Besson film was on release.

Majority-French productions accounted for 85% of admissions in 2019, an exceptionally high figure, up 20% compared to 2016 and 2018, and the second-highest figure in the past decade after 2015. Minority coproductions accounted for 6.07 million admissions, more than one third of their score in 2018, when four titles sold more than 1 million tickets for a total of some 8 million between them.

The number of French films on release in foreign theaters continued its steady rise, with seven of these drawing more than 1 million spectators — up 1 to compared to 2018, but only 64 of them recorded more than 100,000 admissions, which is 14 fewer. The top 10 in 2019 accounted for 19.3 million admissions, which is twice as many as the previous year, and the concentration among the five top-performing films soared to 39.9%. The figures show more films, more big hits (four productions with majority-French financing recorded more than 3 million total admissions, compared to none in 2018) and, at the same time, increasing difficulty for mid-budget films to break the 100,000-admissions barrier.

Europe is the only region to see more spectators for French films compared to the previous year and for 65.3% of the 40.5 million admissions recorded. All other regions outside Europe saw an average drop of around 25%. Whereas traditionally high-potential foreign-language films could once open the doors to so-called emerging markets where French-language fare struggles, 2019 seems to have partially shattered this tendency, impacted by the poor performance of *Anna*. This phenomenon also affected China: although a record 11 French-language films were released there, they only sold 1.13 million tickets, the poorest performance ever registered in this country. Furthermore, neither *Anna* nor *Mia and the White Lion* were released in Chinese multiplexes. Strong competition for screens, changes in the marketplace and in spectator habits, and socio-political crises affecting certain territories are all factors which did not facilitate the international distribution of French cinema.

That said, there is no doubting the appetite for French cinema, which holds a prime spot on all five continents, thanks to its rich and diversified offering. Many films sold more tickets abroad than in France and enjoyed good local runs. Around 30 foreign territories posted cumulated box office numbers higher than in 2018. French cinema remained an essential ingredient of international festivals, as shown by the analysis carried out by EMNS, a summary of which is presented for the first time in this brochure.

In 2020, a fresh batch of films will enter the fray, including *Aline Dieu*, *Annette*, *BAC Nord*, *Benedetta*, *Bergman Island*, *Bronx Cuban Network*, *De Gaulle*, *Effet Eiffel*, *L’Origine du Monde*, *How to be a Good Wife*, *The Lost Prince*, *Little Vampire* and *Poly*, not forgetting the titles which will continue their international roll-out, such as *An Officer and a Spy*, *Les Misérables*, *Portrait of a Lady on Fire*, *The Specials*, *The Translators*, and *The Truth.*
This return to form was long awaited, the first installment of the saga having attracted 9.85 million admissions. \textit{Serial Bad Weddings 2} posted the best opening for a French film abroad, selling 1.37 million tickets in Germany, along with 300,000 in Belgium. The film has garnered more than 100,000 admissions in 7 other markets. However, the film’s international performance to date (including the German film’s international performance in 7 other markets) are only one third of that of its predecessor released in 2013.

The French film that sold the most tickets outside France in 2019 was \textit{Anna}. The Luc Besson-directed movie was released in more than 70 territories and totaled some 4.35 million admissions, including 1.39 million in Central and Eastern Europe. The thriller drew more than 100,000 spectators in 14 foreign countries, performing best in Russia (908,000). However, the comparison with the box office of the director’s previous films is unequivocal: since 2013, they have all sold more than 10 million tickets, with \textit{Lucy} out in front with 56 million admissions.

Only 100,000 admissions separate the top two titles. Released across the five continents, \textit{Mia and the White Lion} sold a total of 4.25 million tickets, including 3.21 million in Europe and 890,000 in Latin America. The film was a surprise hit in Italy, where it became the sixth biggest French hit of the past decade with more than 900,000 spectators. It sold comfortably more than 100,000 tickets in six other territories, including Mexico and Colombia. \textit{Mia and the White Lion} is now the most widely-seen French adventure film of the last decade.

A second animation film and another sequel both featured in the top 5 of 2019. More than 1 million foreign spectators followed the adventures of \textit{Minuscule - Mandibles from Far Away}, including 488,000 in China and 195,000 in Poland. It was the biggest French hit of the year in China. Like \textit{Asterix}, \textit{Minuscule}’s performance was step up compared to \textit{Asterix – The Mansion of the Gods} (3.16 million) and \textit{Asterix and the Vikings} (2.7 million).

As in 2018, comedy was the genre which generated the most admissions outside France, accounting for around one third of the annual total (12.9 million). Despite that, this total, for which Western Europe accounted for 62.8% (42.4% of total tickets in the region), was down 21.9% compared to 2018. \textit{Serial Bad Weddings 2} was the only title to sell more than 1 million tickets, while another three drew more than 500,000 spectators: \textit{Sink or Swim} (1 million admissions in total), \textit{Non-Fiction}, and \textit{Woman at War} (minority).

\textbf{Drama} saw a 33.1% drop in admissions, but was still on the podium. The million-selling titles were \textit{Cold War} and \textit{Everybody Knows} (minority), while the surprise hit was \textit{The Mustang}. This debut feature film took $5m at the US box office (533,000 spectators), a strong performance which allowed drama to corner the lion’s share in the North American market, with 51.7% of French admissions for the year. Other strong performers were \textit{An Officer and a Spy} and \textit{Portrait of a Lady on Fire}, which had promising openings.

## Breakdown of French Films Admissions Abroad in 2019

### By Genre

- **Fantasy / Horror / SF**: 3%
- **Animation**: 13.8%
- **Thriller / Adventure**: 24.8%
- **Drama**: 24.7%
- **Comedy / Dramedy**: 31.7%
- **Documentary**: 2.1%
- **Horror / SF**: 2.1%
- **Fantasy / Sci-Fi**: 2.1%
- **Dramedy**: 2.1%
- **Comedy / Drama**: 2.1%
- **Non-Fiction**: 2.1%

### Top 5

1. **Monsieur Claude 2**
2. **Asterix – The Mansion of the Gods**
3. **Minuscule - Mandibles from Far Away**
4. **Anna**
5. **Asterix and the White Lion**

### CO _DI_ MEDY

- **The Mustang**
- **Sink or Swim**
- **Non-Fiction**
- **Woman at War**

### TH _RI_ LLER / ADVENTURE

- **The Mustang**
- **World War Z**
- **The Sisters Brothers**

### ANIMAT _I_ ON

- **Minuscule - Mandibles from Far Away**
- **Asterix and the Vikings**
- **Asterix and the White Lion**

### DRAMA

- **Cold War**
- **Everybody Knows**
- **An Officer and a Spy**
- **Portrait of a Lady on Fire**
### BREAKDOWN OF FRENCH FILMS ADMISSIONS ABROAD IN 2019 BY REGION

#### TOP 5 TERRITOIRES BY ADMISSIONS TO FRENCH FILMS IN 2019

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<thead>
<tr>
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<tbody>
<tr>
<td>1. Italy</td>
<td>4.34</td>
<td>+10%</td>
<td>25.5</td>
</tr>
<tr>
<td>2. Germany</td>
<td>3.91</td>
<td>+31%</td>
<td>29.5</td>
</tr>
<tr>
<td>3. Spain</td>
<td>3.34</td>
<td>+11%</td>
<td>19.5</td>
</tr>
<tr>
<td>4. USA &amp; English-speaking Canada</td>
<td>3.17</td>
<td>-18%</td>
<td>25.6</td>
</tr>
<tr>
<td>5. Russia</td>
<td>2.83</td>
<td>+26%</td>
<td>9.6</td>
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</tbody>
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(*Figures not definitive)

#### BOX OFFICE HIGHLIGHTS

- **Aïlo’s Journey** became the third biggest French hit of all time in Finland.
- **Asterix – The Secret of the Magic Potion** was top of the Greek box office for three weeks.
- With **Climax**, Gaspar Noé enjoyed the best opening for any of his films in the United States.
- **Just a Breath Away** was the highest-grossing French film in French language in Peru since 2000.
- The best performance in a foreign market for **Ibiza** was in Portugal.
- **The Mustang** was the top-selling French debut film since 2000 in the United States.
- **Mia and the White Lion** generated more admissions on the international market (4.29 million) than in France (1.45 million).
- In Italy, **La Belle Époque** clocked up more admissions in its second week than its first.
- **Portrait of a Lady on Fire** posted one of the best per-screen averages for a foreign-language film on limited release in the United States for 20 years.
- Five weeks after its release, **Serial Bad Weddings 2** was still screening in more than 600 German cinemas and was in the local top five.

For the fourth consecutive year, **Western Europe** was the leading export market for French films. With a total of 19.1 million spectators, in line with the figures from 2018, the region accounted for almost half of French cinema admissions for the period. Three countries in the region sold more than 3 million tickets and were in the top five for the year. While admissions in Austria, Germany, and Turkey were up, ticket sales fell in Belgium, the United Kingdom, and Scandinavia. The three biggest hits in the region were **Serial Bad Weddings 2** (2.71 million spectators), **Mia and the White Lion** (2.32 million) and **Asterix – The Secret of the Magic Potion** (1.69 million).

For the fourth consecutive year, **Central & Eastern Europe** stayed in second spot, totaling 7.35 million spectators for French films in 2019. Admissions across the region grew by 9.2% compared to 2018 and its market share rose to 18.2%, the highest for a decade. French productions sold more than 2 million tickets in Russia and Poland, the two leading markets, and French cinema also fared well in the Czech Republic and Slovakia. Two films drew more than 1 million admissions, **Anna** and **Asterix – The Secret of the Magic Potion**, closely followed by **Mia and the White Lion** (890,000). **The Mustang** sold an outstanding 550,000 tickets. Driven by **Asterix – The Secret of the Magic Potion** (117,000 admissions) and **Serial Bad Weddings 2** (111,000), French cinema admissions grew by 32.4% in Quebec, although combined sales still remained below 1 million.

As in 2018, **Asia** was the fifth biggest export market for French cinema in 2019. China simultaneously recorded the highest number of releases and the lowest total admissions in the last decade for French cinema. **Anna** was the top-selling title across the region (788,000 admissions), which accounted for the rise in admissions for French movies in Indonesia and the Philippines. It was followed by **Mandibles from Far Away** (545,000 admissions). These two productions underline the appetites in the region for action and animation films. Among localized hits, **Love at Second Sight** sold 92,000 tickets in South Korea: no French-language film has performed so well in that market since **The Bélier Family** in 2014.

- **Western Europe**: 19.1 million* (Share: 47.1%)
- **Central & Eastern Europe**: 7.35 million* (Share: 18.2%)
- **Asia**: 3.74 million* (Share: 9.24%)
- **Oceania**: 0.76 million* (Share: 1.93%)
- **North America**: 3.9 million* (Share: 9.64%)
- **Latin America**: 4.77 million* (Share: 11.8%)
- **Africa & Middle-East**: 6.88 million* (Share: 17.7%)

(*Figures not definitive)
THE PERFORMANCE OF INDUSTRY PROFESSIONALS IN FOREIGN MARKETS IN 2019

TOP 10 INTERNATIONAL SALES AGENTS
By admissions to majority-French films abroad in 2019

International sales agent
1 StudioCanal
   Mia and the White Lion, Sink and Swim, Love at Second Sight
2 Orange Studio
   Serial Bad Weddings 2, City Hunter
3 SND
   Asterix - The Secret of the Magic Potion
4 Gaumont
   Ibiza, The Mistery of Henri Pick, Ailo’s Journey
5 Playtime
   An Officer and a Spy, Non-Fiction, Who You Think I Am
6 Wild Bunch
   The Sisters Brothers, The Truth, Climax
7 TF1 Studio
   In Your Hands, The Extraordinary Journey of the Fakir
8 Pathé Films
   La Belle Époque, The Wolf’s Call
9 mk2 Films
   Portrait of a Lady on Fire, Maria by Callas
10 Futurikon
   Minuscule - Mandibles from Far Away

TOP 10 EXECUTIVE PRODUCERS
By admissions to majority-French films abroad in 2019

Executive producer
1 EuropaCorp
   Anna
2 Galatée Films & Outside Films
   Mia and the White Lion
3 Les Films du 24 & Les Films du Premier
   Serial Bad Weddings 2, City Hunter
4 SND
   Asterix - The Secret of the Magic Potion
5 Légende
   An Officer and a Spy, The Mustang, Edmond
6 Trésor Films
   Sink or Swim, Little White Lies 2
7 Futurikon
   Minuscule - Mandibles from Far Away
8 Gaumont
   Ibiza, The Mystery of Henri Pick, Rolling to You
9 Chi-Fou-Mi Productions
   Sink or Swim, The Wolf’s Call, In Safe Hands
10 master films & TAT productions
   Terra Willy

TOP 10 FOREIGN DISTRIBUTORS
By admissions to majority-French films abroad in 2019 and having released at least 3 new films

Distributor | Territory | Highest-Grossing Movie in 2019
--- | --- | ---
1 Neue Visionen Filmverleih | Germany | Serial Bad Weddings 2
2 A Contracorriente Films | Spain | Mia and the White Lion
3 Kino Świat International | Poland | Mia and the White Lion
4 Volga | Russia | Asterix - The Secret of the Magic Potion
5 StudioCanal Germany | Germany | Mia and the White Lion
6 01 Distribution (Rai Cinema) | Italy | An Officer and a Spy
7 Cine Colombia | Colombia | Mia and the White Lion
8 Huaxia | China | Tall Tales
9 Belga Films | Belgium & Luxembourg | Serial Bad Weddings 2
10 I Wonder Pictures | Italy | La Belle Époque

★ One should also note the sales and/or production companies which enjoyed a good year in 2019 thanks to the success of minority-French productions, notably Memento Films (Everybody Knows) and Slot Machine (Woman at War, The House that Jack Built).

★ This ranking underlines both the distributors and foreign territories that have traditionally remained loyal to French cinema and which are key to it spreading beyond France’s borders. Naturally enough, one finds the biggest hits of the year in the major markets. The top 10 features eight European companies (six from the west and two from the east), one from Asia and one from Latin America.
French cinema is an essential feature of the international festival scene. In terms of number of titles screened, it is in first place in five of the 10 events surveyed, ahead of local production and the United States. On average, French cinema has a 19% share of the total number of films selected by the top 10 international film festivals. In other words, in the line-ups of the 10 festivals surveyed in 2019, one in five films is either majority or minority French financed. French movies also feature strongly among award-winners, as illustrated by the 14 major awards won in 2019 (see next page).

**Breakdown of Films Selected by Festival and by Country of Production in 2019**

<table>
<thead>
<tr>
<th>Country</th>
<th>N° of films</th>
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<tbody>
<tr>
<td>Belgium</td>
<td>37</td>
</tr>
<tr>
<td>Germany</td>
<td>33</td>
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<td>USA</td>
<td>17</td>
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<td>Qatar</td>
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