Policy Brief

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The Circulation of European Films in Latin America: Focus on Major Markets and Box Office Performance

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Who is this aimed at

- EU policy-makers
- National authorities
- Industry stakeholders

Key messages

Despite strong cultural, linguistic, and historical ties between Latin America and Europe, the circulation of European films in Latin America is limited and its economic impact unknown. To address this, several key actions should be considered. Firstly, existing support programs for European film distribution and promotion in Latin America should be reviewed and simplified to enhance their accessibility to distributors. Reviving initiatives like Europa Cinema Mundus, which fostered theatrical programming and cross-border exchange, could significantly boost this effort. Secondly, co-production agreements between countries should be revised to align with current industry practices. Furthermore, establishing a central database containing information on co-production agreements and support programs would significantly improve access to resources and facilitate cross-country exchange. Finally, fostering stronger cooperation with publicly managed exhibition windows would enhance the presence and prominence of European films in the region. In short, these measures aim to improve the circulation and, in turn, the potential economic viability of European films in Latin America by simplifying support programs, modernizing coproduction agreements, enhancing information access, and supporting stronger partnerships in film exhibitions with public institutions.

Introduction

Latin America is a key region for the European film industry due to its strong cultural, historical, and linguistic ties to Europe, particularly with Spain and Portugal, and, to a lesser extent, France, Italy, Germany, and Netherlands. The region also plays a vital role in the global film market, hosting prestigious international film festivals and representing some of the largest markets worldwide in terms of admissions numbers. Despite these connections, several barriers hinder the circulation of EU films, including regulatory challenges, and the overwhelming dominance of Hollywood blockbusters in the region. This policy brief is based on a study conducted in the REBOOT project aimed at examining the views of international film professionals towards the European Film Industry (EFI) in six international markets.

The UC3M research team focused on Latin America, more specifically, in the three countries with the most developed film industries: Argentina, Brazil and Mexico. These countries have the largest cinematographic industries in the region, representing more than 80% of the fiction films produced

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(Rodríguez, 2020). Additionally, Mexico and Brazil have considerable home audiences, with Mexico being the fourth largest market in the world in terms of tickets sold, while Brazil ranks ninth. Whereas Argentina is the tenth largest market globally by feature film production (Kanzler & Fioroni, 2024). Using existing market data and preliminary findings from interviews conducted by the team as a starting point, the objective of this brief is to provide an overview of European films' performance in theaters in Argentina, Brazil, and Mexico, along with basic recommendations.

Context

A recent study by the European Audiovisual Observatory revealed that between 2014 and 2023 Latin America[10] accounted for 5% of total admissions to European films followed by the US and Asia, each with 5%, while Europe accounted for an overwhelming 82%. Focusing exclusively on 2023, non-European markets accounted for only 26% of export admissions[11], a notable decline compared to previous years, during which the market share of admissions to European films consistently fluctuated around 50%. Out of the said 26%, Latin America accounted for 10%, followed by North America with 7%, Asia with 4% and other markets with 5% (Fioroni, 2024).

Table 1: General Data

	Argentina	Brazil	Mexico
Population 2023 (million)	46.8	204.2	131.2
GDP per capita 2023 (USD)	13.297	10.413	13.804
Gross box office 2023 (million USD)*	168.4	447.9	832.0
Admissions 2023 (million)	40.6	114.1	218.4
Average ticket price 2023 (USD)	4.1	3.9	3.8
Average admissions per capita 2023	0.9	0.6	1.7
Screens 2023	954	3.468	7.389
National market shares 2023	7.6%	3.2%	4.0%

Source: European Audiovisual Observatory - Focus - World Film Market Trends 2024

(*): Estimate based on data provided by Observatorio Iberoamericano do Audiovisual, ICAA, ANCINE and IMCINE to the European Audiovisual Observatory.

[10] Countries covered in the study mentioned representing Latin America are Argentina, Brazil, Chile, Colombia, Mexico, and Venezuela.

[11] Export admissions refer to ticket sales in all markets outside the domestic market, including those in co-producing countries where the financial contributions are minority

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In terms of cinema attendance, Brazil saw an increase of 19.7% in 2023, reaching 114 million tickets. Still the market share of European films based on ticket sales was only 1.8% (2.097.690 tickets), domestic titles took 3.2% (3.701.853), while US titles accounted for 87% of the market (99.201.177) (Ancine, 2023). A similar pattern occurred in Mexico: cinema attendance increased by 26.2% in 2023, with 218 million tickets sold corresponding to 64% of 2019 figures (Kanzler & Fioroni, 2024). Out of those, Europe accounted for 2.3% of the market (5.016.683), domestic films took 4.19% (9.157.699 tickets) and the US represented 90% (196.542.936) (Imcine, 2023). In Argentina, a total of 40.6 million tickets were sold marking a significant increase compared to the previous year's figure of 34.6 million. Out of this figure, national films achieved a market share of 7.6% (3,089,600) (Kanzler & Fioroni, 2024). Since 2022 INCAA has not released its annual report, meaning there is no official data on market share by country of origin. Nevertheless, the Panorama Iberoamericano 2024 report provided market share based on cinema attendance for the Top -100 films in 2023, indicating European films at 1.7% (717.200), US films at 89.3% (37.004.473), and national films at 6.7% (2.793.176) (Egeda, 2024).

When considering solely the number of European films released in each market, European cinema appears to have a stronger performance. In Brazil, out of the 709 films exhibited in 2023, 105 (that is 14.8% of the total) were European, 186 were American (26,2%) and 271 were national titles (38.2%) (Ancine, 2023). In Mexico, Europe released 110 films while the US released 143 films; 95 were Mexican (Imcine, 2023). In Argentina, out of the 420 films exhibited in 2023, 204 were national films while 222 were foreign films (Egeda, 2024). As previously stated, an official breakdown of the number of European and US films exhibited in Argentina in 2023 has not been published by INCAA[12].

Beyond figures, it is evident that although European films reach all three countries examined, contemporary European productions encounter significant barriers to attract audiences. Part of this difficulty seems to arise from the dominance of American films in the box office. These films are distributed by US distribution companies, the majors, which, backed up by Hollywood studios, prioritise blockbusters and other commercially appealing films, invest heavily in promotion and have an extensive occupation strategy, releasing multiple copies and taking a significant portion of the screens in a predatory manner that can´t be matched by independent distributors.

[12] INCAA provides a list of films exhibited each year, which can be accessed through this link. Using this list in conjunction with the Lumiere database to determine the country of origin, it is possible to estimate that 102 European films and 117 US films were exhibited in Argentina in 2023. However, because institutions can classify the country of origin of coproduced films differently, making accurate comparisons and assessments regarding the number of films per country and their respective market shares remains challenging.

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Screen quotas for national films in place, both in Brazil and Argentina, further restrict the opportunities for screenings of European films in these countries. Exacerbating the situation, exhibitors tend to favor franchises and blockbusters to attract a perceived guaranteed audience, additionally limiting the exhibition space for films from other countries. As a consequence, independent distributors that normally handle non-mainstream films (European titles, for instance) have difficulty finding a theatrical window of exhibition for their releases.

Although available data is limited, a similar pattern worth highlighting can be detected outside the theatrical market. Brazil and Mexico have well established commercial televisions companies that maintain their market dominance despite all the changes in the audiovisual sector. Mexican owned Televisa (now TelevisaUnivision) and Brazilian owned Grupo Globo, are vertically integrated conglomerates that take part in both production and distribution activities, generating most of what they broadcast. While Argentina doesn't have a large national television company, its audience also favours domestic content. As a result, broadcasters in the region have little interest in showcasing European cinema. Despite the fact that some European channels including European films are available either on pay cable or satellite TV bundles in all three countries, such as Europa Europa, Eurochannel, France 24, TVE Internacional, Rai DW and RTP International, to name a few, their viewership numbers remain modest.

On the other hand, video-on-demand (VOD) services have a strong presence in the region, driven by US-based global streamers, such as Netflix, Disney+, Max and Prime Video. The popularity of these services has significantly altered viewing habits and impacted traditional cinema consumption patterns. In Argentina, Netflix was the leading VOD provider in 2023, holding a market share of 35,8%, followed by Disney+ (15,4%), Max (13%) and Star+ (12,8%) (Obitel, 2024). In Brazil, despite limited data, Globoplay (Grupo Globo), seemed to surpass Netflix in number of subscriptions, boasting 30 million users[13] during 2023. Nevertheless, Netflix was still the leading service when it came to market share with 28.5%; Globoplay had 8.7%. In the case of Mexico, Netflix maintained a market share of 53% while Disney+ and Max experienced growth in 2023, reaching 13.5% and 11.8%, respectively. Meanwhile, ViX+ (TelevisaUnivision) emerged as a significant competitor, quadrupling its market share to 7%.

[13] See es.statista.com/grafico/29404/servicios-de-streaming-con-mas-suscriptores-en-america-latina/
Neither Globoplay nor Netflix release official numbers of its subscribers. Globoplay is estimated to have 30 million users, including unpaid ones. See www.bloomberglinea.com.br/2023/02/23/guerra-do-streaming-globoplay-desafia-netflix-pela-lideranca-do-mercado/

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Findings from the interviews

All three markets considered share similarities but also present distinct differences when it comes to the circulation of European films in their territory. Through 46 interviews with film professionals (16 from Argentina, 16 from Brazil, and 14 from Mexico), conducted from September 2023 to October 2024, key insights have emerged regarding the challenges and opportunities encountered within the circulation of European cinema in these countries.

a. The existence of important non-commercial circuits

> *"European cinema is highly sought after and prestigious. We not only have the Cannes Film Week, which obviously features European films, along with films from other countries, but here in Argentina, we also have the French Cinema Week, the Italian Cinema Week, and the German Cinema Week. It's very common to see European films in various cycles or settings. Particularly, there is a very eager art film circuit, including director retrospectives"* (Argentinian policymaker).

In Argentina, Brazil and Mexico there are two primary channels for the circulation of European films. There's a non-commercial circuit intertwined with diplomatic efforts, by European embassies and cultural institutions, organizing events like European film weeks, film festivals and exhibitions, which have symbolic importance. There is also a commercial circuit, which, post-pandemic, faces notable hurdles in showcasing European films.

While non-commercial initiatives are important to disseminating European films and culture, they don't seem to translate into a significant increase in the circulation of European films within the commercial circuit. Contemporary European cinema (particularly non-mainstream films) seems to be mostly confined to specialised arthouse or independent outlets, film festivals, a few pay cable and satellite TV channels and platforms like MUBI that focus on independent films. Notable exceptions include European films attaining international acclaim by securing prestigious festival awards and films that have a partnership either with Hollywood studios or a transnational VOD service, as they are likely to be exhibited.

A notable initiative worth highlighting, since it combines commercial and non-commercial aspects and players, is the Tour de Cine Frances in Mexico, the world's most important traveling French film festival according to Unifrance[14]. This itinerant french film festival was created nearly three decades ago in a partnership between Mexican distributor Nueva Era Films, the Cinepolis exhibition chain,

[14] See: https://en.unifrance.org/news/16986/28e-tour-de-cine-frances-the-world-s-most-important-traveling-french-film-festival

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the French Embassy and Mexico's Alliances Françaises network. This particular festival differs from others in the region for its reach which goes beyond the main capital cities, travelling to 73 cities in Mexico and 15 cities in Central America (Costa Rica, El Salvador, Guatemala, Honduras, Nicaragua) and for its selection which prioritise commercial French films that don't reach Mexico rather than via independent or festival-oriented films. In 2023 the event had an audience of 253.000 spectators while in 2018 it reached an unprecedented 420,000 viewers (Unifrance 2024).

b. The enduring challenges of commercial circuits

While audiences in all three countries enjoyed European cinema in the past, and classic French, German, Italian and Spanish filmmakers are esteemed among cinephiles, existing data reveals that contemporary European films struggle to secure an exhibition space in theaters as well as in other windows of exhibition. Among the main reasons mentioned by interviewees are the following:

High risk for distributors

> *"In the markets and festivals where we all meet, generally, all Latin American distributors know each other, we have very good relationships, and we form alliances. In fact, we form alliances with Argentine and Brazilian distributors to buy the rights for all of Latin America and have more reasonable prices, with lower risk"* (Mexican film distributor).

Latin American distributors carry a high risk when acquiring rights of European films. European films´prices are often high when converted into local currency while ticket prices are comparatively low. As a result, distributors need to sell more tickets in their local market to cover costs. Given that European films usually don't draw large crowds or run for extended periods in theatres, distributors frequently struggle to make a profit. In the case of Argentina, the country's economic instability exacerbates the situation, with the steep devaluation of the local currency often preventing distributors from purchasing films at high prices for the local market or fulfilling payment obligations to European counterparts. The country´s implementation of non-tariff trade barriers and import restrictions complicates the acquisition process for foreign films, including cultural services and copyright fees. In addition, independent distributors lack sufficient capital for extensive promotional activities, limiting the visibility of these films.

Some independent distributors across the region are attempting to overcome these limitations by establishing partnerships to acquire films with rights across Latin America, subsequently dividing distribution responsibilities based on their respective territories. This collaborative approach enables them not only to buy films at a better overall price compared to individual rights purchased for each

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distributor's respective region, and enhance their leverage when negotiating with film producers but also to use digital aggregators to commercialise films to niche streaming services, expanding the reach of these productions in the region. It also allows for the possibility of selling the film to a global streaming service, which is more inclined to buy from a local distributor that holds regional rights. Remarkably, although independent distributors in Mexico go through the same hurdles, they benefit from the existence of Cineteca Nacional in Mexico City. This space focuses mainly on independent and European cinema and has earned a loyal following among the city's cinephiles, as reflected in its consistently high ticket sales. Unlike traditional commercial cinema chains, like Cinepolis and Cinemex, the Cineteca offers prolonged runs of eight weeks for every film, providing an extended opportunity for these films to reach a wider audience.

Limited support programmes

> (Support programs for distribution) "*needs to be less bureaucratic, because you have to create impressive dossiers… and then when it's approved, you're granted the help. Then, it's another issue, you have to send a lot of paperwork, etc. And the amounts are very small. So, we're all fighting over a smaller and smaller pot*" (Mexican film distributor).

Support programs for the distribution and promotion of European films are available, often contingent on certain national film institutions (e.g., French films benefit from incentives provided by Unifrance, German films receive support from German Films). However, interviewees across all three countries expressed concerns regarding the complexity and bureaucratic nature of these schemes. In addition, many distributors noted a consistent decline in the financial support offered by these programs over the years. It was also mentioned that payments are often delayed several months after the initial expenditure.

Concentration of the exhibition

> *"Theaters or television platforms have ceased to be, due to the way they are organized, a viable alternative for acquiring, for example, a French film, a Latin American film, or even distributing Argentine cinema that is not the most mainstream. With the current market concentration, there is no real opportunity in theatrical exhibition, nor is there a substitute or complement like there once was with DVDs, or as there used to be with certain TV sales in subregions like the Southern Cone—something that would allow us to continue acquiring quality European cinema, quality Latin American cinema, or quality Argentine cinema, which today faces greater challenges in theaters. The dominance of this concentration, and the*

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ongoing trend toward even greater consolidation, has reached a point where support, funding, or incentives are urgently needed for such films to regain the tools they need to reconnect with audiences." (Argentinian film distributor).

The exhibitionn sector in all three countries is highly concentrated, with foreign players dominating the sector in Brazil and Argentina and two local exhibitors taking 97% of the market in Mexico. These big multiplex chains prioritise Hollywood blockbusters, limiting the space for European films in all three countries. As a consequence, European films, particularly independent or non-mainstream, are limited to independent cinemas or relegated to film festivals or thematic weeks. Independent exhibitors mentioned the importance of Europa Cinemas Mundus, a programme that provided support for the exhibition of European films from 2011 to 2013. They emphasized that a similar initiative would help them remain viable and allocate more space in their programming for non-mainstream films, including European productions.

<u>*Scarce media coverage*</u>

"Distribution has always been difficult. There have always been significant investments in marketing for big films. However, thanks to the support of the press, there was an important space in Brazil for non-Hollywood cinema. After the pandemic, this space has drastically diminished. Today, the main need in Brazil's non-Hollywood film market is to create a media outlet, both print and online, dedicated to cinema and capable of generating constant public interest." (Brazilian film exhibitor and distributor).

It was noted by interviewees in Brazil and Argentina that the press has ceased its coverage of cinema showtimes and reduced the number of critics´ reviews of non-mainstream films. This absence of traditional media coverage diminished even more the avenues through which non-blockbuster films were previously promoted and is believed to have a direct impact on their discoverability and potential consumption.

<u>*Growing importance of streaming services*</u>

"Basically, the other problem we face is that many platforms and TV networks only buy rights for all of Latin America, while we only have the rights for the Southern Cone. This makes it impossible to sell a film to a major platform. Even if we had rights for all of Latin America, most of these major platforms are very difficult to access, to pitch material, have it evaluated, and get it purchased. It's very hard for a distributor, acting alone, to sell to a major platform, even

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with rights for all of Latin America. As a result, we're practically limited to theatrical exploitation, which comes with its own challenges and limitations." (Argentinian film distributor)

The theatrical performance of European films has been significantly impacted by the rise of streaming services. In all three countries, while European titles are present on different streaming offerings, their representation is largely confined to films from France, Spain, and, occasionally, Germany. As a result, smaller productions struggle to be featured. Furthermore, global streaming services such as Netflix, Max or Prime, usually bypass local distributors, buying European films directly from sales agents. MUBI engages with local distributors but offers low prices. In the case of local streaming services operated by national cinema institutes, like Cine.Ar Play in Argentina and Nuestro Cine in Mexico (Brazil is planning to launch its own service, Tela Brasil, in the first trimester of 2025), their focus is primarily on domestic productions, while those owned by local broadcasters, such as Globoplay (Grupo Globo) and Vix (TelevisaUnivision), prioritize their own content, typically excluding European films.
The one exception seems to be content aggregators, such as Sofa Digital in Brazil, that resell niche content to smaller VODs, aiding in this way European film distribution. These services are one of the few willing to buy European films from local distributors in the region. It is also worth noting that during the pandemic some local independent distributors in Brazil launched their own VOD services to promote their catalogues. Most services didn't survive, but their attempts highlight the limited visibility of non-mainstream films in general and European productions in particular.

c. Shortcomings of coproduction agreements

"These coproduction agreements need to be renewed because they are very outdated, considering a reality that has changed a lot. If you look at, for example, the Brazil-Italy Coproduction Agreement from the 1970s, it doesn't make sense. In light of this changing reality, it is necessary to restructure it." (Brazilian film producer and director).

Some professionals emphasized that several co-production agreements with European countries are outdated, failing to address the current needs of the audiovisual industry and its professionals, thereby hindering collaboration. Finding information about coproduction agreements and grants available for non European professionals from each European country is also challenging. They suggested that aggregating and centralizing the information available would make it easier to access and understand requirements.

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Policy recommendations

Despite its limited scope, the preliminary findings of this study have several policy implications that require further consideration for action.

1) **Reboot support programs:** Taking into account the difficulties outlined by interviewees when it comes to distributing and exhibiting European films in Latin America, reviving programs such as the Europa Cinema Mundus, which used to offer support for theatrical programming based on circulation and exchange between MEDIA countries and non-MEDIA member states, should be considered. The MEDIA Mundus program, which existed between 2011-2013, also had lines focused on distribution, promotion and even co-production with countries outside of Europe and it was highly regarded amongst Latin America professionals. Furthermore, current support programs for the distribution and promotion of European films could be reviewed and restructured to simplify the complexity and administrative burden involved in accessing funding, which can deter participation, especially of small players, and hinder the efficient use of resources. Streamlining application procedures and providing clear, user-friendly guidelines would significantly improve the accessibility of these programs for distributors. Moreover, a more predictable and timely payment system should be introduced to ensure that distributors can plan and execute promotional activities effectively.
2) **Revise and modernize co-production agreements:** As mentioned, the vast majority of interviewees highlighted the importance of coproduction agreements for the internationalization of films and knowledge exchange between different countries. Due to the fact that a significant number of co-production agreements date back to the 1990s or early 2000s, making them outdated and in need of revision, to ensure the alignment with contemporary industry practices it would be useful to revise and change agreements currently in place.
3) **Consolidate and centralize information:** Information about coproduction agreements with European countries and existing support schemes is often scattered and fragmented across multiple websites, institutions and countries. As a consequence, it can be hard for foreign film professionals to find the correct data and understand the requirements, especially considering that resources are also in different languages. A central database with all the content would ensure easy accessibility and facilitate better access to resources and possibilities of exchange across countries.
4) **Explore partnerships with publicly managed windows of exhibition:** Reflecting on ways of leveraging possible cooperation between publicly managed windows of exhibition, such

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as Cineteca National in Mexico, Cine Gaumont in Argentina or CineSesc in Brazil, could be beneficial to increase the circulation of European films in these markets. These institutions already assign and give prominence to independent and arthouse films in their programs and tend to exhibit more European films than commercial chains. Greater support with issues such as exhibition rights, dubbing and subtitling, could enhance the presence and visibility of European films. The same would apply to publicly managed streaming services such as CINE.AR Play and Nuestro Cine. While these services prioritise national films, a partnership could foster the circulation and exchange of titles, giving European films another window of exhibition while possibly opening a window for Latin American productions in the EU.

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