



EUROPA CINEMAS



Cannes 2026

Network
Review
#47

Facts & Figures
2025

European
Animation Gains
Momentum

One Buzz After
Another

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EUROPA CINEMAS NETWORK REVIEW #47 – MAY 2026

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The House Is Full. And Getting Younger.

Walk into a European arthouse cinema on a Friday night and look around. The audience is not what the obituaries predicted. It is young, loud and opinionated. It reviews and logs everything on Letterboxd and now it wants the real thing: a dark room, a big screen and strangers sharing in the experience.

The numbers back it up. Letterboxd hit 27 million members in 2025, up from just 1.8 million in 2020. Half its audience is under 35. Their taste leans towards indie and auteur-driven films. Their hunger is for classics. All over Europe, subscription network Cineville is expanding and uniting (young) cinephiles. In the US, it's Gen Z that champions, in equal measure, Cannes standouts, elevated horror and Hollywood comedies. This is not a niche recovery. It is a structural shift.

In the Netherlands, young(ish) film entrepreneurs like us recently built new arthouse venues, through collaboration and community rather than structural subsidies (which has been going to the same arthouses for decades). Across Europe, similar stories are unfolding. The foundations laid for our sector by the arthouses that started in the '70s-'80s, and reinforced since 1992 by the Europa Cinemas network, made all of this possible. Streaming sparked curiosity; Cineville brings access; and cinemas deliver the irreplaceable experience.



Frank Groot

What gives me confidence is not just the audience numbers. It is that the generation driving this revival loves cinema and still has so much to see. They cross borders and time through film, share their newly acquired taste across languages, regard classics as essential additions to their viewing, and the European arthouse network as their own. While Hollywood is fighting an originality crisis, AI, and itself, our European network is getting stronger.

That network exists because of sustained investment by the European Commission. The case for renewing it in the new EU budget is not a request for rescue. It is an invitation to double down on something that is visibly, undeniably working.

The house is full. Let us continue expanding it.

Frank Groot co-founder KINO Rotterdam
& Board member of Europa Cinemas



KINO Rotterdam

Rising to the challenge

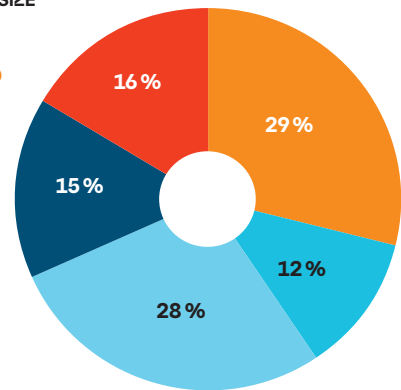
Steady Results Amid Market Changes

In 2025, the broader market experienced weaker mainstream releases and declining attendance. Across the EC /MEDIA network's **1,253 cinemas** and **2,941 screens**, overall results remained stable. Total admissions dipped marginally by **0.1%**, as total screenings increased by **0.9%**. This translated into a decline of roughly **1%** in average admissions per screening, reflecting lower audience density in certain markets.

Across the network, each screen ran, on average, **~21 sessions per week**, demonstrating steady use despite varying operating patterns between venues.

CINEMAS BY CITY SIZE

| | |
|-----|---------------|
| 359 | < 50 000 |
| 146 | 50 - 100 000 |
| 351 | 100 - 500 000 |
| 190 | 500 000 - 1M |
| 207 | > 1M |



NETWORK RESULTS

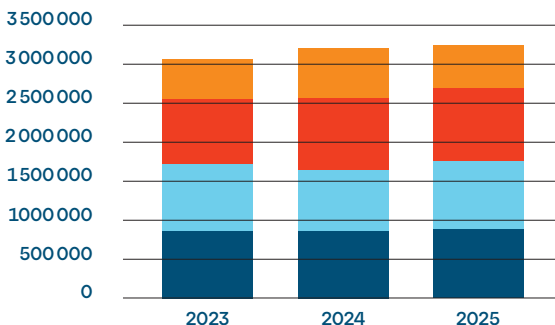
| | 2023 | 2024 | 2025 |
|------------------------|------------|------------|------------|
| Total admissions (Mio) | 68 375 457 | 72 396 576 | 72 308 887 |
| Cinemas | 1 212 | 1 245 | 1 253 |
| Screens | 2 853 | 2 931 | 2 941 |

From Local to Continental

European Non-National Films Engage Cinemagoers

SCREENINGS BY CATEGORY

Others
US
European Non National
European National



Strategic programming decisions across the network enabled cinemas to respond to shifting market conditions, setting the stage for a stronger European film presence in 2025.

European titles accounted for **1.78 million** screenings, a **7.5%** increase compared with 2024, and generated **38.6 million** admissions, up **6.2%**. This translated into a **53.4%** share of total ticket sales. European films traveling beyond their home market contributed significantly to this growth, with screenings rising **12.4%** to **889,962** and admissions increasing **7.6%** to **16.8 million**, showing continued audience engagement with a diversity of stories.

Beyond the Capitals

24 New Cities and 39 Cinemas Join the EC Network

The EC network maintained consistent growth, welcoming **62** new screens across **24** cities. Most of these venues are small, one- or two-screen sites, making up roughly three-quarters of the new members, while a few feature up to four screens. The expansion reflects the network's strategy of bringing European cinema closer to audiences, offering local access to diverse films beyond major metropolitan centers.



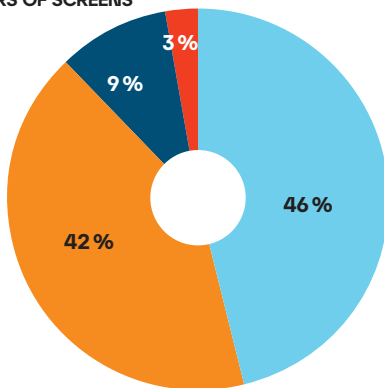
Kino Kilta, Turku, (FI), EC member since 2025

Diversity

The Heart of the Network

CINEMAS BY NUMBERS OF SCREENS

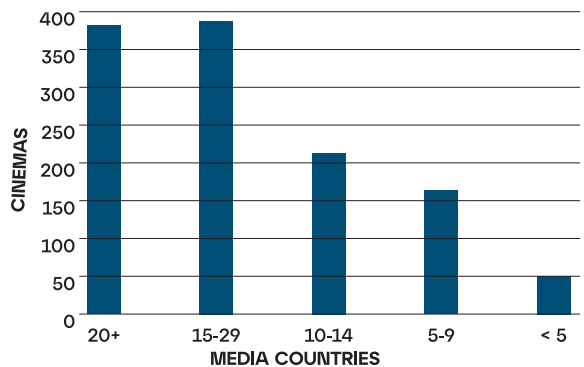
573 **Single Screens**
 532 **2-4 Screens**
 116 **5-7 Screens**
 32 **+8 Screens**



Diversity drives resilience, creativity, and relevance across the EC network and its impact is visible in every corner, on every screen, and behind every programming choice. In 2025, the EC network encompassed **1,253 member cinemas** across Europe, with **245** located in capital cities, and over one thousand more spread across towns and communities of all sizes. The network offers a vibrant mix of cinema experiences: **Single-screen** venues and those with **2-4 screens** together account for **88%** of all cinemas, while venues with **5-7 screens** represent **9%** and multiplexes with **eight or more screens** make up **3%**, providing variety and scale to the overall landscape.

How Many Different MEDIA Nationalities Do EC Members Screen?

In 2025, the EC network reinforced its commitment to showcasing European cinema. Nearly **60% of cinemas**, a **7.14%** increase from last year, screened films from **15 or more MEDIA countries**, highlighting a diverse programming landscape.



Women Directors in the Top 50 European Films



Vermiglio
 Countries **30**
 Cities **542**
 Cinemas **744**

In 2025, women directed **28%** of the top 50 European films, up from **22%** the previous year, and their films collectively accounted for **24.6%** of total admissions.

Among these top-ranked titles, **L'Attachement (FR)** by **Carine Tardieu**, **Vermiglio (IT)** by **Maura Delpero**, and **22 Bahnen (DE)** by **Mia Maariel Meyer** stand out, enriching the variety of stories on European screens.

Ukrainian Voices on Screen

Ukrainian films in 2025 maintained a modest but visible presence within the network. **Dva Prokurora** by **Sergey Loznitsa** is a notable example, attracting over **62,000 admissions** across **16 countries**. In contrast, **Antarktyda** by **Anton Ptushkin**

achieved more localized success in Poland, drawing over **30,000 viewers**. The Danish documentary **Mr Nobody Against Putin**, directed by **David Borenstein** and **Pavel Talankin**, circulated in **19 countries**.



Country Focus
 Scan, Click,
 Discover

General Programming

What Worked in 2025?

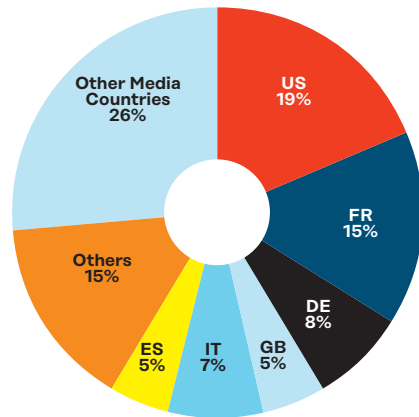
Walk into any EC member cinema, and the trailers tell a story even before the feature begins, reflecting intentional programming choices.

In 2025, over **two-thirds** of films programmed across the network came from **MEDIA countries**, while **US titles** accounted for **less than one in five**. Among European nations, **French** films led with over **15%** of all programmed titles, followed by **German** and **Italian** films, each contributing more than **7%**. By genre, documentaries represented nearly **17%**, animation **7%**, and fiction the remainder.

Programming choices, however, only tell part of the story. Audience performance varied significantly by screen size.

Single-screen cinemas led for European films, which accounted for **56%** of admissions, compared with **24%** for US titles, while multiplexes were dominated by US films (**46%**) over European productions (**38%**). Mid-sized venues with two to four screens performed best for national cinema, with local films drawing **30%** of admissions, the highest share across all categories. Cross-border European productions saw an uneven pattern, reaching **27%** of admissions in single-screen cinemas but just **15%** in multiplexes. Overall, US films held a **30%** market share, though they were no longer the sole growth driver: admissions for national films rose **5.2%**, cross-border European titles increased **7.6%**, while British films declined sharply, losing nearly half of their admissions compared with 2024.

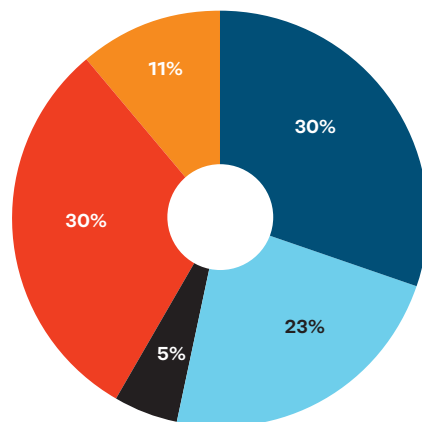
PROGRAMMED FILMS BY COUNTRY OF ORIGIN



2025 ADMISSIONS MARKET SHARE

Others
US
UK

European National
European Non-National



Showcasing European Non-National Cinema

Top Venues by Market Group



Paris Cinema, Berlin (DE), EC member since 1995

Among cinemas with regular screenings, a significant share exceeds the network average of **25%** for European non-national film admissions across all market types.

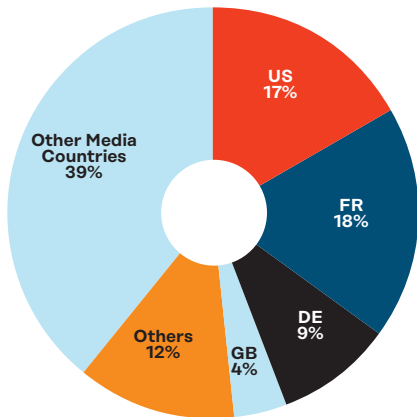
This is the case for **39%** of cinemas in major markets (Paris Cinema in Berlin, Germany: **66%**), **59%** in mid-sized markets (Cinémarche, Marche-en-Famenne, Belgium: **77%**), **64%** in smaller markets (Kino Film Europe, Bratislava, Slovakia: **73%**), and **71%** in emerging markets (G8 in Sofia, Bulgaria: **50%**).

*In brackets: the highest-ranking cinema for each market category.

Engaging the Next Generation

Connecting with Young Audiences

YOUNG AUDIENCE FILMS BY COUNTRY OF ORIGIN

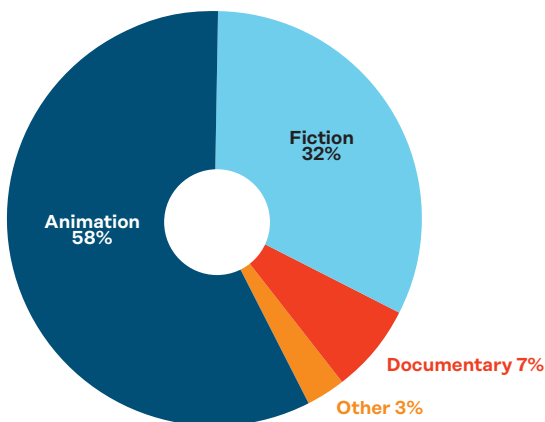


In 2025, **72%** of member cinemas hosted young audience initiatives, offering over **3,180** initiatives featuring European films. **Finland** led with a fourfold increase from 2024, while **Hungary** and **Romania** each recorded a **30%** gain.

Although the number of venues grew modestly, by just over **2%**, European film screenings rose more, by **11.1%**, driving admissions up **7.4%**. On average, each venue showed **31** European films, with national titles accounting for **37%** of admissions and non-national European films for **32%**. European productions made up **66%** of all programmed films, led by **France** at **18%** and **Germany** at **9%**. Among non-European titles, **US** films made up **17%**, while **British** productions accounted for **4%**.

Diversity at the Top Young Audience Actions by Admissions

TOP YOUNG AUDIENCE FILMS BY GENRE



In the 2025 **Top 10** young audience initiatives by admissions, **Poland** leads with two entries. **Germany, France** and **Belgium** also have **two** entries each, while **Austria** and **Slovenia** appear **once**.

Among the top 10 films, **seven** came from **MEDIA countries**, led by **Flow** from **Latvia**, which topped the list. **France** contributed four popular titles, while **Germany** and **Norway** each had one.

Top 5 European Films in YA Initiatives by Admissions (All figures are for YA screenings)



Flow
Country **LV**
Screenings **6 237**
Admissions **197 140**



Arco
Country **FR**
Screenings **2 592**
Admissions **93 218**



School of Magical Animals 4
Country **DE**
Screenings **2 543**
Admissions **78 806**



A Mouse Hunt for Christmas
Country **NO**
Screenings **1 863**
Admissions **71 940**



Hola Frida
Country **FR**
Screenings **1 777**
Admissions **65 451**



Country Focus
Scan, Click,
Discover

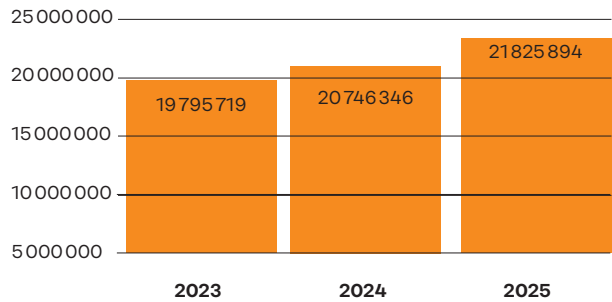
Local Heroes

Films that Score at Home

National films continued to solidify their position across the network in 2025, confirming a longer-term upward trend despite some year-on-year variation.

Compared with 2024, their presence grew in both volume and reach: screenings increased by **3.1%** to over **890,000**, while admissions rose by **5.2%** to **21.8 million**.

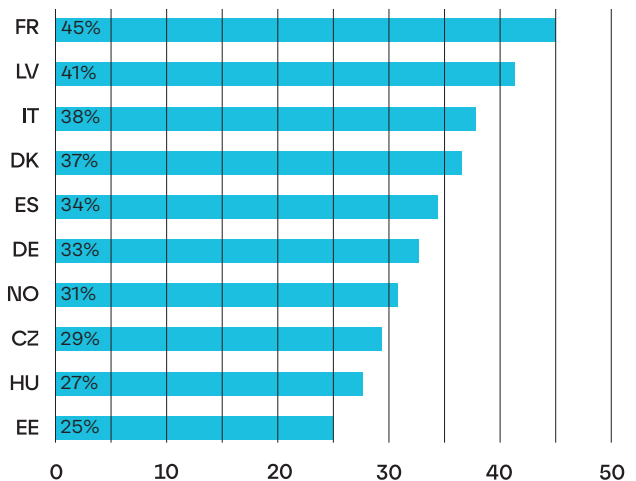
EUROPEAN NATIONAL FILM ADMISSIONS



Leading Markets for Domestic Hits

As expected, individual results largely reflect each market's size and production capacity. **France, Germany, Italy, and Spain** consistently rank at the top for national film presence and performance. Yet several smaller markets also stood out: **Denmark** and **Latvia** exceeded the network average, reaching around **30%** of screenings and **36%** and **41%** of admissions, respectively. **Norway** performed strongly in admissions, topping **33%**, despite fewer national films and screenings than average. Similarly, the **Czech Republic** and **Hungary** achieved above **26%** in admissions.

ADMISSIONS NATIONAL SHARE (%): TOP 10 COUNTRIES



National Champions

These five films achieved the highest share of total national admissions in their respective countries.



Hajduk in Belgrade

Country **RS**

% of national share: **57%**



Černák

Country **SK**

% of national share: **49%**



The Southern Chronicles

Country **LT**

% of national share: **36%**



Fiume o Morte!

Country **HR**

% of national share: **28%**



The Yellow Tie

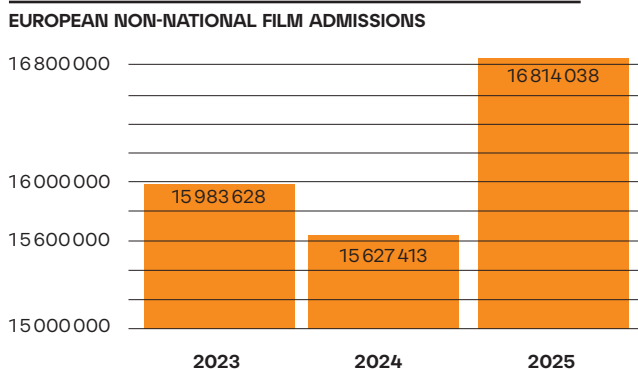
Country **RO**

% of national share: **22%**

Wandering Stars

Films that Cross Borders

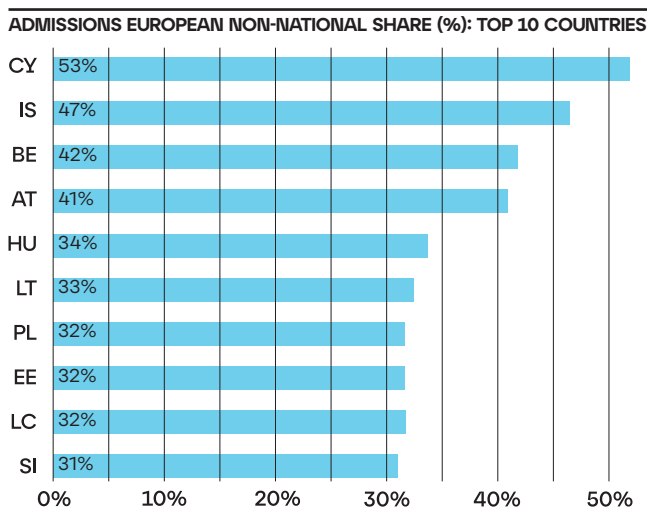
European non-national films strengthened their presence across the network in 2025, after a decline in the previous year. Their footprint expanded in both volume and reach, with screenings rising by **12.4%** to over **890,000** and admissions increasing by **7.6%** to **16.8 million**, reflecting renewed audience interest in cross-border European stories.



Performance Across Borders

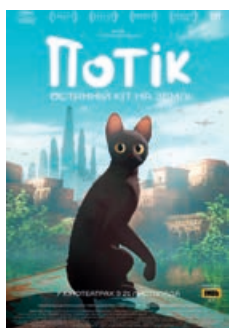
Across the network, no market recorded a share of admissions for **European non-national** films below **10%**, and most reached **30%** or more. Certain territories stood out: in **Cyprus** and **Iceland**, where the EC network has one member cinema in each country, **European non-national** films accounted for around **50%** of admissions, while in **Belgium** and **Austria** they reached approximately **40%**.

Even in major markets such as **France**, **Germany**, **Italy**, and **Spain**, where local production is strong and competition high, **European non-national** films maintained a solid presence, representing **17–21%** of total admissions.



International Champions

These five titles accounted for the highest share of admissions among European non-national films across the network, outside their country of origin:



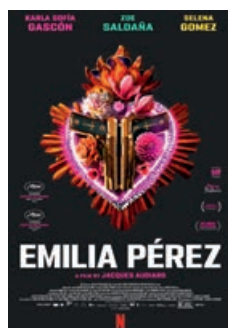
Flow
 Countries **33**
 Cities **643**
 Cinemas **946**
 Admissions **659 342**



Sentimental Value
 Countries **25**
 Cities **416**
 Cinemas **606**
 Admissions **561 387**



The Marching Band
 Countries **23**
 Cities **452**
 Cinemas **659**
 Admissions **529 854**



Emilia Perez
 Countries **30**
 Cities **449**
 Cinemas **679**
 Admissions **444 189**



Sirat
 Countries **21**
 Cities **370**
 Cinemas **529**
 Admissions **399 805**



Country Focus
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Building The Future: Training & Innovation



CTI project INCLUCINE in Kino Usmev, Kosice (PL), EC member since 2017

Europa Cinemas has also supported its members through two interconnected funding schemes.

The Training Boot Camps address immediate, local skill gaps by funding practical trainings where compact hands-on teaching meets peer-learning. This grassroots upskilling can then also feed directly into the **Collaborate to Innovate (CTI)** programme, which offers funding for groups of cinemas to apply their enhanced skills to large-scale, (trans)national innovation projects, from sustainability initiatives to digital audience development.

Since its launch in 2024, the **Training Boot Camps** programme has supported **13 projects** across **11 MEDIA countries**, reaching **155 cinemas** and over **434 participants**. This includes **123 EC member cinemas** and **224 network participants**.

The session in 2025, funded **six projects**, across **six countries**, focusing on data-driven working, audience development, marketing, branding, youth inclusion, social media, and audience loyalty.

The **CTI 2025** edition supported **six projects** in **seven countries**. Since its inception in 2021, this scheme has funded **57 projects**, across **23 MEDIA countries**, with **335 participating cinemas**, including **308 EC members**. Notably, **40%** of these projects have either been replicated across the network or remain ongoing.

Examples include **Cineville**, an unlimited cinema subscription model launched in the **Netherlands** in 2011, which was later expanded with the support of **CTI to Belgium (2022), Austria (2023), Germany (2024) and Sweden (2025)** and **Cinema without Barriers**, an accessibility-focused initiative originating in **Poland** and later replicated in **Slovenia** and further adapted in **Romania** and **Slovakia**.

| | COLLABORATE TO INNOVATE | TRAINING BOOT CAMPS |
|-----------|--|--|
| CORE IDEA | Solving shared challenges through teamwork. | Identifying a specific local need and organizing a practical workshop to address it. |
| FORMAT | Collaborative projects focused on developing joint services and initiatives. | Short, intensive, and solution-oriented. |
| GOAL | To support creative solutions that foster growth across the entire European exhibition sector. | To bring all cinemas in a region up to a common standard in key areas like innovation, audience development, and digital skills. |

Country in Focus Poland



Kino Nowe Horyzonty, Wrocław (PL), EC member since 2016

Poland continued to expand its presence within the EC network in 2025, adding **two new cities, four new cinemas, and six additional screens**. While **Warsaw** remains the largest hub with **nine venues**, the network now reaches **16 medium-sized cities (100k–500k population)** and **11 smaller towns** under **100,000 inhabitants**, stretching from **Jarocin** to **Zwoleń** and **Ełk** to **Łowicz**.

Overall, results in Poland showed moderate growth in 2025. Screenings edged up **5.4%**, while admissions grew by **6.5%**. Reflecting broader network trends, European admissions grew by **21.1%**, and European screenings increased by **18.1%**. Meanwhile, European non-national admissions jumped **24.1%**, supported by a **20.1%** rise in their screenings.

Polish exhibitors have consistently set a high standard, with their work reflected in multiple EC awards over the years: one for entrepreneurship, two for programming, and three for young audience initiatives.

The most recent, in 2025, highlights **Kino Nowe Horyzonty in Wrocław** for its comprehensive educational programme.

Across the country, Polish cinemas continue this momentum. Over **90%** of member cinemas organized YA initiatives with European programming, with European non-national films making up around **50%** of all titles shown and nearly **60%** of screenings and admissions. This strong engagement with European films in educational and youth-oriented programmes is mirrored in audience preferences: the top-performing films in Poland show remarkable diversity.

While national productions remain strong, accounting for **22.16%** of total admissions and **21.18%** of total screenings, European cinema from across the continent also found a significant place on Polish screens. **Danish, Latvian, Italian, and French** titles all rank among the most watched, with the European share of admissions in the TOP 10 reaching **75%**.

Top 5 European Films by Admissions



Good Home
Country **PL**
Screenings **2 371**
Admissions **115 388**



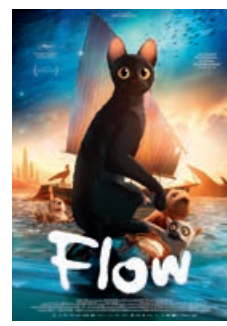
Chopin, Chopin!
Country **PL**
Screenings **1 894**
Admissions **71 217**



The Girl with the Needle
Country **DK**
Screenings **2 488**
Admissions **62 618**



The In-Laws 3
Country **PL**
Screenings **2 277**
Admissions **56 050**



Flow
Country **LV**
Screenings **2 476**
Admissions **47 410**



Country Focus
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TOP 50

European Movies

By Admissions
Europa Cinemas/
MEDIA 2025

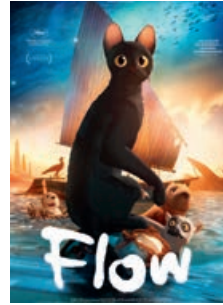
1



En fanfare

Director **Emmanuel Courcol**,
Nationality **FR**, Countries **24**, Cities **562**,
Cinemas **798**, Admissions **683 528**

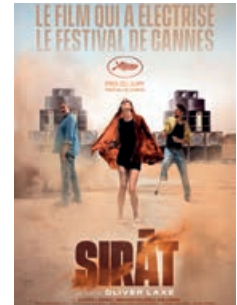
2



Straume

Director **Gints Zilbalodis**, Nationality **LV**,
Countries **34**, Cities **646**, Cinemas **951**,
Admissions **673 823**

3



Sirāt

Director **Oliver Laxe**, Nationality **ES**,
Countries **23**, Cities **404**, Cinemas **584**,
Admissions **624 879**

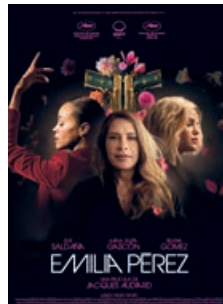
4



Affeksjonsverdi

Director **Joachim Trier**,
Nationality **NO**, Countries **26**, Cities **418**,
Cinemas **613**, Admissions **610 319**

5



Emilia Perez

Director **Jacques Audiard**,
Nationality **FR**, Countries **31**, Cities **562**,
Cinemas **820**, Admissions **497 248**

6



La Venue de l'avenir

Director **Cédric Klapisch**,
Nationality **FR**, Countries **16**, Cities **451**,
Cinemas **607**, Admissions **470 640**

7



Follemente

Director **Paolo Genovese**,
Nationality **IT**, Countries **22**, Cities **324**,
Cinemas **470**, Admissions **446 493**

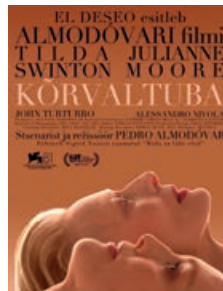
8



Amrum

Director **Fatih Akin**, Nationality **DE**,
Countries **10**, Cities **216**, Cinemas **308**,
Admissions **410 015**

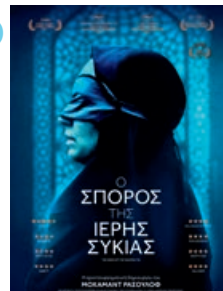
9



La habitación de al lado

Director **Pedro Almodóvar**,
Nationality **ES**, Countries **29**, Cities **417**,
Cinemas **554**, Admissions **372 302**

10



Daneh Anjeer Moghadasi

Director **Mohammad Rasoulof**,
Nationality **DE**, Countries **30**, Cities **545**,
Cinemas **773**, Admissions **368 770**

11



L'Attachement

Director **Carine Tardieu**, Nationality **FR**,
Countries **13**, Cities **400**, Cinemas **529**,
Admissions **353 661**

12



Diamanti

Director **Ferzan Özpetek**,
Nationality **IT**, Countries **21**, Cities **222**,
Cinemas **337**, Admissions **319 581**

13



L'Etranger

Director **François Ozon**,
Nationality **FR**, Countries **11**, Cities **231**,
Cinemas **306**, Admissions **305 024**

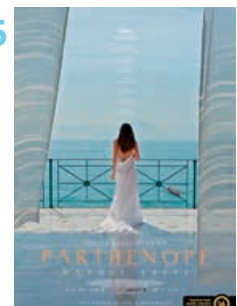
14



Vermiglio

Director **Maura Delpero**, Nationality **IT**,
Countries **30**, Cities **542**, Cinemas **744**,
Admissions **282 094**

15



Parthenope

Director **Paolo Sorrentino**,
Nationality **IT**, Countries **29**, Cities **470**,
Cinemas **646**, Admissions **281 426**

| N° | ORIGINAL TITLE | NATIONALITY | DIRECTOR | COUNTRIES | CITIES | CINEMAS | ADMISSIONS |
|----|----------------------------------|-------------|--|-----------|--------|---------|------------|
| 16 | Vingt Dieux | FR | Louise Courvoisier | 29 | 487 | 662 | 241974 |
| 17 | 22 Bahnen | DE | Mia Maariel Meyer | 5 | 118 | 180 | 239959 |
| 18 | Vie privée | FR | Rebecca Zlotowski | 17 | 256 | 312 | 239807 |
| 19 | In die Sonne schauen | DE | Mascha Schilinski | 19 | 173 | 275 | 239374 |
| 20 | Černák | SK | Jakub Kroner | 2 | 41 | 58 | 235847 |
| 21 | Los domingos | ES | Alauda Ruiz de Azúa | 3 | 46 | 69 | 232513 |
| 22 | Das Kanu des Manitu | DE | Michael Herbig | 3 | 79 | 97 | 228556 |
| 23 | Partir un Jour | FR | Amélie Bonnin | 14 | 271 | 334 | 206322 |
| 24 | Den sidste viking | DK | Anders Thomas Jensen | 17 | 219 | 301 | 205784 |
| 25 | La Femme la plus riche du Monde | FR | Thierry Klifa | 10 | 187 | 225 | 204831 |
| 26 | La pie voleuse | FR | Robert Guédiguian | 10 | 304 | 384 | 204813 |
| 27 | No Other Land | DE | Yuval Abraham, Basel Adra, Hamdan Ballal | 29 | 401 | 535 | 203117 |
| 28 | La petite dernière | FR | Hafsia Herzi | 13 | 228 | 307 | 201432 |
| 29 | Buen Camino | IT | Gennaro Nunziante | 1 | 66 | 79 | 198572 |
| 30 | Hvis ingen går i fella | NO | Henrik Martin Dahlsbakken | 25 | 353 | 454 | 184451 |
| 31 | Monsieur Aznavour | FR | Grand Corps Malade, Mehdi Idir | 19 | 281 | 408 | 183055 |
| 32 | Arco | FR | Ugo Bienvenu | 14 | 195 | 246 | 182051 |
| 33 | Dossier 137 | FR | Dominik Moll | 13 | 173 | 203 | 178630 |
| 34 | Le Chant des forêts | FR | Vincent Munier | 4 | 125 | 139 | 169592 |
| 35 | Quand vient l'automne | FR | François Ozon | 23 | 351 | 521 | 168589 |
| 36 | Wunderschöner | DE | Karoline Herfurth | 7 | 109 | 146 | 166695 |
| 37 | Die Schule der magischen Tiere 4 | DE | Bernhard Jasper, Maggie Peren | 6 | 105 | 150 | 165826 |
| 38 | Le assaggiatrici | IT | Silvio Soldini | 11 | 189 | 271 | 162439 |
| 39 | Jouer avec le feu | FR | Delphine Coulin, Muriel Coulin | 15 | 291 | 358 | 154249 |
| 40 | Fuori | IT | Mario Martone | 8 | 222 | 282 | 153828 |
| 41 | Le città di pianura | IT | Francesco Sossai | 8 | 105 | 145 | 152509 |
| 42 | Köln 75 | DE | Ido Fluk | 20 | 398 | 532 | 150829 |
| 43 | Jane Austen a gâché ma vie | FR | Laura Piani | 20 | 349 | 469 | 149903 |
| 44 | Pigen Med Nålen | DK | Magnus von Horn | 24 | 285 | 381 | 147911 |
| 45 | À bicyclette! | FR | Mathias Mlekuz | 9 | 145 | 167 | 143714 |
| 46 | Drømmer | NO | Dag Johan Haugerud | 30 | 453 | 611 | 138962 |
| 47 | Jeunes mères | BE | Jean-Pierre Dardenne, Luc Dardenne | 19 | 327 | 411 | 138662 |
| 48 | La vita va così | IT | Riccardo Milani | 2 | 79 | 110 | 137628 |
| 49 | L'histoire de Souleymane | FR | Boris Lojkine | 18 | 283 | 377 | 136933 |
| 50 | Franz | CZ | Agnieszka Holland | 11 | 256 | 365 | 136540 |

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Country Focus
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European Animation Gains Momentum

In lieu of the Oscar awarded to Gints Zilbalodis's animated film, *Flow* (2024), there appears to be a growing appetite for European animation. Exhibitors are stepping up their efforts, as is the entire industry. Here's an overview of the current situation.



In Waves © Silex Films



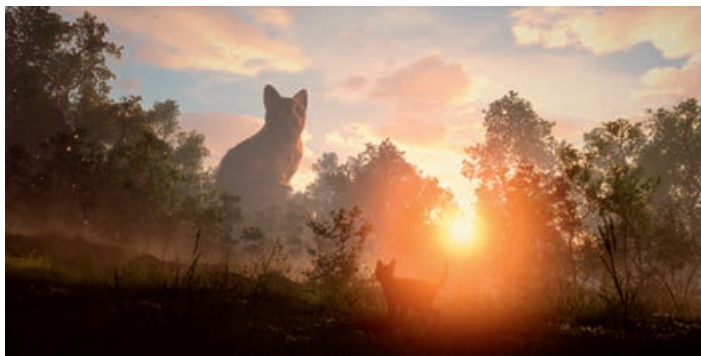
Anney International Animation Film Festival, 2026

European animation has experienced remarkable growth in recent years. While Hollywood and Japanese productions remain safe bets, new players have successfully entered the market. The Oscar for Best Animated Feature Film awarded to Gints Zilbalodis' *Flow* last year confirmed this trend. Two European products were nominated this year at the Oscars in the animation category. Moving forward, the industry can increasingly rely on European creators. "Animation breaks down barriers more easily than live action," says **Stéphane Auclair**, cofounder of France's **UFO Distribution** who released *Flow* across France. "This confirms that it is not just the Americans who have a say on the matter, and that there is more to animation than just Japanese animation. The success of *Flow* also confirms that buzz can quickly build around an animated film. After all, animation is part of everyone's culture, with a huge audience base."

Many exhibitors have made animation a central part of their programming and are well aware of this. This is certainly true for **Anne-Laure Louvet**, Communications and Education Manager at the **Cinéma Galeries in Brussels**: "For several years now, Cinéma Galeries has established itself



Annecy International Animation Film Festival, 2025 - © B. Aguirre



Flow © UFO Distribution

as a showcase for animated films for both children and adults," she says. "Thanks to our preview screenings, retrospectives, secret screenings, and all of our community work, the people of Brussels trust us to introduce them to animated films. Our programmes run at Cinéma Galeries throughout the year, and outdoors in the summer with specially curated programmes for holiday camps... Last year, *Flow* was the film seen by the most viewers at our cinema, even though we had already organised a large number of preview screenings in 2024. At the time, we hosted the preview screening in the presence of the director. It was a huge success, as the screening took place in both auditoriums and both were sold out."

"Unfortunately, the stereotype that animated films are mainly for young audiences still persists."

Metka Dariš

Within this European context, the key issue regarding animation in cinemas centres on the target audiences, and therefore on the development of appropriate programmes.

Metka Dariš, Director at **Kinodvor in Ljubljana**, highlights the perception

that animation is intended solely for children. "Most of the theatrically released animated films we screen at Kinodvor are launched as part of our children and family programme, Kinobalon. For instance, we premiered and ran an all-audience title like *Flow* as part of our Kinobalon programme. The reason for doing this is that, unfortunately, the stereotype that animated films are mainly for young audiences still persists. I say 'unfortunately' as we often try to break that stereotype: most notably by hosting the International animated film festival Animateka during cinema's 'high season' (December) at Kinodvor." This view is echoed by **Pierre Mazars**, one of the co-founders of **Charades**, the French international sales company that handled the sales for *Flow*. In his view, animation should be considered in its own right, rather than as a genre: "It's silly to view animation in relation to other genres. There isn't, for example, a 'Best Horror Film' category at the Oscars. Animation today is breaking free; those aimed at adults are moving towards themes that were rarely tackled until now. Animation is emerging from its niche to be viewed as 'normal' cinema."

“Buyers are more open than before, but they remain selective.”

Lorena Booth

Despite long production times and costs, European animation has regained the confidence of distributors. “Before, when we talked about adult animation, buyers would run away. Today, they’re listening because they can see there are successes,” adds Pierre Mazars. A view shared by **Lorena Booth**, Senior Manager of Sales and Acquisitions at **Studio 100 Film GmbH**. “Since the Oscar win for *Flow*, there has definitely been a noticeable shift in buyer curiosity toward independent animation. Buyers are more open than before, but they remain selective. Films like *Flow*, *Memoir of a Snail*, *Robot Dreams*, and *Chicken for Linda!* have proven that distinctive, director-driven animation can break through internationally. What *Flow* really changed wasn’t the market; it expanded the imagination of what’s possible, giving independent producers a lot of hope, renewed confidence for what’s to come, and what can be achieved on a global scale.” An opinion tempered by **Katja Hohler**, executive producer of Slovenia’s **Animateka International Animated Film Festival**: “While [*Flow*’s] victory was widely noted and celebrated within the European animation community, we did not notice a stronger appetite for animation within the general audience. The film itself perhaps got an additional push in terms of distribution, but we did not notice a wider ripple effect in Slovenia. In general, we are, however, noticing that, in the past 10 years, more and

more animated feature films are bought for distribution in Slovenia.”

At the heart of this dynamic, the **Annecy Festival** and its market, Mifa, play a vital role. Every year in June, the global animation industry gathers in the Alpine town to showcase upcoming productions (including those from Hollywood) and launch long-term projects. **Véronique Encrenaz**, Head of Mifa, is delighted with this success: “The number of professionals and students from the animated film industry attending the festival in Annecy has grown exponentially over the past 20 years, and particularly in the last 10 years. The number of accredited attendees has more than doubled, reaching 18,200 from 118 countries in June 2025 – the highest attendance ever recorded by the festival and the market. These figures demonstrate how the animation industry, even though it is currently facing difficulties in certain countries, is experiencing strong growth worldwide, with new countries joining the sector every year.”

“We’ve never received as many feature films as we have this year, and the average quality has never been higher.”

Marcel Jean

As for **Marcel Jean**, Annecy’s artistic director, he too has noticed a rapidly growing trend: “We are seeing the emergence of so many new film industries, and every year we receive more films from an ever-wider range of sources. So I find it hard to imagine that the current momentum will fade any time soon. Technological developments have helped to



Little Amélie © 2025 Maybe Movies, Ikki Films, 2 Minutes, France 3 Cinéma, Puffin Pictures, 22D Music

democratise production to some extent, and high-quality works are coming to us from all over the place. Of course, the industry is going through some turbulence, and companies are struggling but, overall, the movement shows no signs of running out of steam. We've never received as many feature films as we have this year, and the average quality has never been higher. It's even become a bit of a struggle! Films that would have been in the official competition 10 years ago can't even find a place outside of the competition today. And when I look at the list of projects currently in production, it's impressive, and makes you want to get involved. Over the past few months, I've been to Portugal, Hungary, Canada and Colombia. Everywhere, exciting projects are in production. So I'm optimistic about the future of animation."

Vincent Le Leurch Journalist

Europa Cinemas Workshop Annecy, 2026

To strengthen the role of cinema exhibitors within the ecosystem, Europa Cinemas launches a four-day interactive workshop at Annecy Int. Animation Film Festival 2026 from Monday 22 June to Thursday 25 June, in collaboration with MIFA, the Annecy Film Festival market, within the framework of the Creative Europe MEDIA programme.

As a pilot initiative, a limited number of Europa Cinemas exhibitors will be invited to immerse themselves in the Annecy experience through four days of workshops, screenings, work-in-progress sessions, conferences, and exhibitions.



Arco © Diaphana Distribution



Annecy International Animation Film Festival, 2025 - © T. Jaffre

Kino Moscow (Yerevan, Armenia)

Where modern meets history

The oldest cinema in Yerevan, Kino Moscow is home to the grand tradition of cinema-going as an event. Located in the famous Charles Aznavour Square in the country's capital city, the cinema was originally opened in 1936. Home to many festivals, Kino Moscow's four modernised screens regularly host a mix of Armenian, European and other international cinemas.



Inside a screening room at Kino Moscow

Kino Moscow's rich history includes redesign in the 1960s, redevelopment in the early 1980s and post-Soviet rebranding and privatisation in the late 1990s. Further refurbishment took place with privately-raised funds from the cinema in 2024. Only closing each auditorium one at a time, Kino Moscow stayed fully operational and open to the public throughout. Each auditorium is now equipped with modern technology.

For their official re-opening event, they made a special short film about the venue's history, including AI integrations that animated old photos to literally bring the past into the present.

Collaborating with local embassies, they also host various special events and gala screenings to offer cinema-going as an occasion, "We organise many premieres," Deputy Director of

Marketing **Anahit Khachatryan** says.

"Kino Moscow is the main cinema house in the city. We have a red carpet day which gives prestige to the events and location."

Due to its central location, during the summer months, various other festivals and events in the city are organised nearby, with Kino Moscow at the very centre of it all.

A significant city square that commemorates Armenian independence, it is a site for vibrant city life and regularly has impressive sculpture installations too. Along with guest Q&As and discussions, and a children's film festival in the autumn for under 16s, the cinema also display occasional art exhibitions linked to their programming in the venue's foyers.

Armenian movies and comedies are the most popular with their audiences but "Everyone can come and enjoy watching



Front of Kino Moscow at night

the movies,” Khachatryan says, “because we have everything.”

“We have free screenings for soldiers, for children from disadvantaged families and disabled people. We also have Movie Days with special prices on Mondays, Tuesdays and Wednesdays,” General Manager **Ruzan Abgaryan** adds, “And we do a lot of additional discounts for special groups such as children and schools.”

“The modernized halls of Kino Moscow offer unprecedented comfort and high-quality viewing: the Red Large Hall accommodates 470, while the Red Small Hall seats 49; the Blue Large Hall has 354 seats, and the Blue Small Hall seats 35. Additionally, a VIP hall has been designed with comfortable seats that can be adjusted, ensuring a premium viewing experience that meets modern standards.” Abgaryan adds.

Always looking to update and offer their audience the best, the team at Kino Moscow – 40 people in total, from hosts through to

management – market their films in a mostly organic way, optimising social media trends and utilising many in-house screen displays to promote their events and projects.

“This year marks the 90th anniversary of Kino Moscow,” Khachatryan says, “It is where modern meets history, and in December we will have a big event.” A unique and momentous celebration for Yerevan, Kino Moscow is the only historic cinema to have survived in the country’s capital. Most of the other city cinema sites have since become “shopping malls, hotels or parking complexes,” Khachatryan says. “We are the only one in the city centre, in an historic building, and we are really proud to work here.”

“Before, Yerevan had more than 20 cinemas,” Abgaryan explains, “But only ours has stayed as a cinema. We are proud of it: we are going to continue to be a cinema.”

Tara Judah Film writer

Cinema Concorde (Nantes, France)

Where philosophy meets community

Forty years ago, when Cinema Concorde first opened, it was one of many small neighbourhood cinemas in Nantes. Following gentrification in the city, Cinema Concorde is now one of its last remaining independent arthouses, something Cinema Manager Sylvain Clochard understands as a responsibility to their community.



Le Concorde

The guiding principles at **Concorde** are “emergence and diversity”, **Clochard** explains, “Cultural and artistic emergence, and a diversity for films.” From war movies and documentaries, to Asian, African and South American films, Concorde focuses on first release films and coordinates events and discussions (three or four times a week) around those films.

Concorde’s approach to audience development is to foreground and “share our passion of cinema and what the movies are talking about,” Clochard says, further explaining how their passion extends to their communities: “We do a lot to help disadvantaged people know that arthouse cinema is also cinema for them.”

Like all French arthouse cinemas, Concorde works with school groups, but beyond this they have specific programmes designed to engage young cinephiles. Over the past five years, Concorde has run an initiative

for young people aged 15-25. The project is comprised of two parts, the first of which is a club for young critics. The group watch 20 to 30 films and then write or vlog about them, posting to Concorde’s own YouTube channel or Instagram page as well as interviewing and profiling directors and actors to better understand the wider field of film journalism.

The second part of the project is more hands-on, focused on video production. Each year, the group make a short documentary: “This year there is a film about love,” Clochard says, “people meeting in the cinema.”

“We have three people in our team who teach them how to film and edit,” Clochard explains. Involvement in the project is taken up organically, with participants either finding out about the programme on Facebook or Instagram or via the cinema’s on-screen advertisements.



Le Concorde - Screen Spirit



Le Concorde - Les Filmeurs



Le Concorde - Les Filmeurs

“At the start of the year - and throughout the year - many people come to the cinema to ask how they can be involved,” Clochard says. “Young people tell us this is a cool experience and that they feel good after participating.

“It’s a lot of work but it’s important for us. We began this activity just after Covid, and we needed to reach young people. It’s really important to open the cinema up to young people. Over the past five years, we’ve had a great connection with them and some of them are now working in distribution and production.”

In the same vein, the cinema also launched a nationwide initiative in 2023, Screen Spirit, with the support of Europa Cinemas’ Collaborate to Innovate programme. Live streams were broadcasted on Twitch directly from the cinema.

They also work with a support centre for young people with mental health issues offering daytime screenings with art therapy

activities designed to reduce stress and that are connected to the films. “We have activities around animation, where they can draw in 2D and direct a short film, for example,” Clochard explains.

In September last year they launched their first edition of the FilmHer festival, designed to increase visibility for women in cinema, especially those behind the camera. “It’s really important for us,” Clochard says of the festival, which is a co-production with PAN (Produit À Nantes), a collaborative filmmaking project that has been focused on community-driven film creation since 2016.

Removing the barriers to entry is how Clochard and his team bring their philosophy of emergence and diversity resolutely to life: “The community must understand that it is their cinema also, and not just a high brow arthouse cinema, which is hard work to do.”

Tara Judah Film writer

Cinemas Victoria, Timiș & Studio (Timișoara, Romania)

Where cinema serves the community

When Timișoara, a mid-sized city in Western Romania, was designated European Capital of Culture for 2023, the local authorities began investing in cultural infrastructure for the future, including the refurbishment of five derelict cinemas from the Communist era. Three of them – Victoria, Timiș and Studio – are now Europa Cinemas members. Owned by the municipality of Timișoara, programmed and operated by a small, passionate team in the local public institution Center for Projects, the cinemas represent an investment in community and culture.



Cinema Timis - Full house for Timeless Timis special screening
© Centrul de Proiecte Timișoara



Studio - view from outside
© Centrul de Proiecte Timișoara

Cinema Victoria opened in September 2022. A single-screen venue with 193 seats, some 20 minutes' walk from the city centre, Victoria aims to be “a community cinema”, focusing on European (over 70% of total screenings) and children’s films. As the first venue to reopen, it also served as “a testing ground”, Cinema Manager **Ioana Dragomirescu** says. “Prior to 2022, Timișoara was the only major city in Romania without an arthouse cinema. For a decade there had been no independent venue outside multiplexes in shopping malls. We really didn’t know if the public would embrace a different kind of programming.”

The following year, to coincide with the Capital of Culture celebrations, their largest venue, **Timiș**, opened in the main square of the city. Its curved single screen, 14 metres wide with 500 seats, hosts bigger

releases, international classics, live and recorded concerts, and other high profile public events.

Just three minutes from Timiș is **Studio**, the network’s third venue, which opened in 2024. Dating back to the 1930s, the refurbished building was redesigned in collaboration with local cultural associations, with the aim of creating the city’s main arthouse and cinephile hub.

With a café, two cinema screens – the larger with 184 seats and a smaller multipurpose room with 60 seats for masterclasses and workshops – and a co-working space, Studio hosted over 15 film festivals last year. Along with arthouse releases, cine-clubs and series dedicated to Romanian and European repertory films, they host acting, directing and filmmaking workshops for the city’s

youth. Additionally, Studio offers outdoor screenings on its rooftop in the summer, which have proved a huge success.

In November last year, the fourth and smallest venue, **Johnny**, opened in a disadvantaged neighbourhood on the outskirts of Timișoara. Conceived as a local cultural centre, it hosts four to five film screenings each week, alongside theatre performances and free after-school activities for children.

The renovation of a fifth venue is expected to finish late 2026/early 2027. "The rhythm has been steady at one new cinema per year," Dragomirescu explains. "It's very ambitious in terms of management and audience building, and quite unique in a country where cinemas closed one after another over the last 30 years. Timișoara is going in the opposite direction."

Although the venues share a common vision, each has its own specific identity. "We programme them differently," Dragomirescu says. "This has been our strategy from the start, otherwise they would compete with each other and divide the audience." Numbers have grown steadily, with over 116,000 admissions across 1,500 screenings and events in 2025.

Through film choice, festival collaborations and monthly films series curated by the team – from film therapy sessions to screenings for vulnerable groups as well as school screenings attended by over 4,700 students last year – the Victoria, Timiș and Studio cinemas are beacons for culture and inclusion: "accessible, lively public arthouse cinemas, where no one is left behind."

Tara Judah Film writer



Studio - open air screening on the rooftop
© Centrul de Proiecte Timișoara



Studio - Full house for marathon screening of *Satantango*
© Centrul de Proiecte Timișoara



Victoria - Film Therapy session, discussion after screening
© Centrul de Proiecte Timișoara

Art Kino Odeon, Kino Union and Kino Sora (Izola, Celje and Škofja Loka, Slovenia) Collaborating for accessible and inclusive cinema for all

Operating entirely independently but working together as an association of arthouse cinemas in Slovenia, Art Kino Odeon, Kino Union and Kino Sora represent three of the 30 national cinemas who collectively lobby for opportunities to support common goals. Beyond their national network, these cinemas also collaborate across borders to offer accessible and inclusive European, independent and arthouse film.

All three cinema venues are historic single-screens: **Art kino Odeon** in Izola has 95 seats and is situated on the coastline, unique for its proximity to its two neighbouring countries, Italy and Croatia; **Kino Union** in Celje historically accommodated 510, but the refurbished Mali Union Hall now seats 70; and **Kino Sora**, so named after the Sora River, which flows through Škofja Loka, a beautiful medieval town with a rich cultural heritage, seats 338.

Serious about film education from a young age, Slovenian cinemas have worked hard both nationally and with their local authorities to support cinema-going for children and young people. On a national level, they have a “film badge” which is connected to the more widely known book badge concept. Participating schools select films and are hosted by the cinemas, who coordinate special guests and discussions. Older children (aged 12-14) write reviews, and secondary school students participate in film selection, resulting in what Program Director at Art Cinema Odeon, **Erik Toth** calls a surprising 50-50 result between blockbusters and arthouse movies: “It’s always a lottery.”

Preschool aged children visit the cinema in four carefully planned stages, age-appropriate for their attention span: “First to see the cinema and what it looks like,” Toth explains, “The second time they



Art Kino Odeon

come, we bring them to the technician.” Understanding the building and its function, “the third time they watch a short cartoon and we talk about it,” he continues. “The fourth time we reward them with a movie screening of approximately 30 minutes.”

Kino Sora’s Director **Tea Oblak** agrees, explaining how they also engage with young cinema-goers, “We devote particular care to young audiences,” she says, “Through “Kino Sova” we prepare special activities for our



Kino Sora



Kino Union

youngest film enthusiasts. These include free accompanying creative workshops linked to quality films from our regular programme and are intended for children aged four and above."

"We also work closely with local primary and secondary schools," she continues. "In addition to film screenings, we offer film education activities, which are an important part of our mission to develop young audiences and film literacy."

Cinema Manager at **Kino Union**, Samo Senicar describes the importance of this close relationship between cinemas and schools, "We work with them closely in preparing school screenings, which are regularly accompanied by some form of discussion or Q&A, helping students engage more deeply with the films they watch."

"Accessibility is one of Kino Union's most distinctive strengths," Senicar continues, "Through the **Cinema Without Barriers / Kino brez ovir** project, supported by the Europa Cinemas' **Collaborate to Innovate** fund, Kino Union offers screenings adapted for deaf and hard-of-hearing, blind and partially sighted audiences. These include descriptive subtitles, Slovenian Sign Language interpretation, audio description and assistive listening technology."

Accessibility and inclusion are essential for Slovenian arthouses, who cater to local, national and even international audiences. "We also pay special attention to Slovenian cinema," Oblak says, "Within the framework of our *Škofja Loka* premieres, we regularly host filmmakers and create opportunities for audiences to meet the people behind the films."

Welcoming visitors before or after their swim in the ocean, Art Cinema Odeon is additionally unique for its bi-lingual population (Slovenian and Italian) and collaborates regularly with arthouse cinemas both within and across Slovenian borders. "We combine our offer, and programme titles and film education projects to the Italian minority here," Toth says.

Far from concerned about the threat from streaming or other aspects of the 'attention economy', Slovenian arthouses are focused on offering the uniqueness of cinema: "It's a cultural and social experience," Senicar says, and Oblak agrees, "Our aim is to create a space where film is experienced as culture and art."

"Cinema is not dying," Toth expounds, "People are fed up with choosing, but we are motivated to be creative in programming and getting to know our audience... to show that anything is possible".

Tara Judah
Film writer

Cines Renoir (Madrid and Barcelona, Spain)

Forty years of pioneering arthouse cinema in Spain

Cines Renoir operates four city centre cinemas in Spain: three in Madrid and one in Barcelona. Renoir Plaza España is a five-screen cinema and the first venue Cines Renoir opened, in 1986 in Madrid. It has since been joined by Renoir Retiro with four screens and Renoir Princesa with 11. Renoir Floridablanca in Barcelona has seven screens and all four cinemas focus on a quality programme of Spanish and European films, screening what Cines Renoir's founder and CEO Enrique González Macho describes as: "auteur cinema in its original version, with spectacular results."



Cines Renoir, Floridablanca



Cines Renoir, Plaza España

This year, they will celebrate their 40th anniversary with a special programme of more than 40 films. To celebrate the occasion, they will also produce a special print issue of their online newspaper *La Gran Ilusión*, which will be available to pick up in all of their cinemas for free from May.

This follows a tradition that **Renoir** started a decade ago to mark their 30th anniversary. In 2016, they launched a short story competition. Each year since they appoint a jury and the awarded stories are published in a book. The writers receive a copy, and the book is also available, for free, in the cinema venues for Club Renoir members. "We are now wrapping up the X edition," Cinema

Manager **Octavio Alzola** says. "Then we will have, together with our community, a special event in which we will award the prizes, and after that we'll show a surprise film. We do this every year, and it is always great to share these moments with our audience."

Club Renoir members are also able to attend special preview screenings, which fosters both a sense of belonging and builds loyalty to the cinemas. Establishing a strong cinema-going community has been at the heart of what Cines Renoir do and can be seen in the continuation of the **Collaborate to Innovate** funded **Viridiana project**. "We are founding partners of the Viridiana project," **González Macho** explains, "a very successful initiative



Cines Renoir, Princesa

that began in 2021 as part of Collaborate to Innovate and continues to this day.”

Viridiana brought 32 Spanish cinemas together to collaboratively support, champion and screen a selection of European films under a shared label. It also coordinated simultaneously broadcast post-screening Q&As, which has proved incredibly valuable for the participating cinemas as filmmakers and other film talent are not always able to travel to every individual cinema for in-person appearances.

“We were pioneers showing films in their original language, too,” González Macho says, “which was largely neglected in Spain. Our programming has no restrictions based on nationality or subject matter; the priority

is the quality and integrity of the films. Naturally, European cinema and, of course, Spanish cinema have been a very important part of our programming.”

“We strive to ensure that our programming is as inclusive as possible,” González Macho continues, explaining how they work to develop young audiences, such as with their schools programme Aula Renoir: “Film screenings for schools are very important for us,” González Macho says. “We have exclusive morning screenings for schools almost every day, ideally integrated with the subjects they teach. These screenings are offered at a special price; we have a limited return on investment, but we believe in the future it will pay off!”

Tara Judah Film writer

Biografen Spegeln (Malmö, Sweden)

A meeting point where less is more

Biografen Spegeln is a three-screen cinema where less is more. Originally built in 1934 and with a varied history of owners, Spegeln is situated in the centre of Malmö, the third largest city in Sweden after Stockholm and Gothenburg. A member of the largest cinema exhibitor in Sweden, Folkets Hus och Parker, since 2007, Spegeln has undergone several significant venue and operational changes to become the unique meeting point for arthouse cinema that it is today.

Between 2007 and 2014, audience numbers remained static at around 20,000 admissions annually until Operations Manager, **Pernilla Nilsson** and her team embarked upon venue refurbishment and operational renewal. Putting in a fully-equipped kitchen to provide an upscaled food and drink offer, focusing on broadening the scope of their film programme and rebuilding their cinema auditoriums not only helped admissions but saw a record-breaking improvement. In 2025, Spegeln had more than 83,000 admissions.

Removing their old cinema seating on what was essentially a no-budget renovation,

Spegeln reduced the capacity in all three of their screens, putting in bigger, cozier sofa seating to make the venue feel more “homely and comfortable”. Reducing their capacity in each of the cinemas by more than 50%, means that when screenings sell out, the audience are more likely to take a chance on another film. “We try to always be at full capacity,” Program Manager David Winsnes explains, “which is easier with small screens.”

“We want people to say: ‘I went to Spegeln’,” Nilsson agrees, “not ‘I saw *Batman*.’” We all love movies, but it will be at *our* place; they want to come to us, and we can curate and



Biografen Spegeln, Twin Peaks day cherry pie with a damn fine coffee cocktail



Biografen Spegeln, bar decoration and afternoon tea



Front of Biografen Spegeln



Wine tasting at Biografen Spegeln

lure them to movies they didn't imagine they would want to watch."

Spegeln has become a place where people want to spend their time. "There's too much content on all the streaming sites and quality time is becoming more important to people," Nilsson says and Winsnes, who sets the film programme up to six months in advance, agrees: "During the pandemic, we had to change things. Since then, we have been able to fine-tune the programme. We try to push the picture of us being a fun and entertaining place to be – inviting our audience to experience films in an arthouse world they were not aware of."

While the bigger films don't require huge effort to sell out - "They solve themselves," Winsnes reflects, citing Chloe Zhao's *Hamnet* and Baz Luhrmann's *Elvis Presley in Concert* - Sweden's national average for cinema-going remains low at 1.7 times per year. This means there is still work to be done, something Spegeln's sing-along screenings, regular repertory and classic film programming and film festivals answer.

"We were first in Sweden to do a lot of event cinema," Nilsson explains, "About three or four years before others." If anything, the cinema has had to reduce the number of special events and festivals (which in 2007 was as many as 13-15), to ensure the venue remains "always open for the people in Malmö."

Winsnes says that they are now also open at Easter, Midsommar and December 23rd as well as New Year's, when they were previously closed. In this way, Spegeln aims to be more accessible to all.

"We are always thankful that we are increasing the number of visitors, which no one takes for granted," Nilsson says. "It's been clear that we have found a way to make people to leave their streaming sofas and to start going to the cinema again, which is fantastic and is a healthy sign."

Tara Judah
Film writer

One Buzz After Another

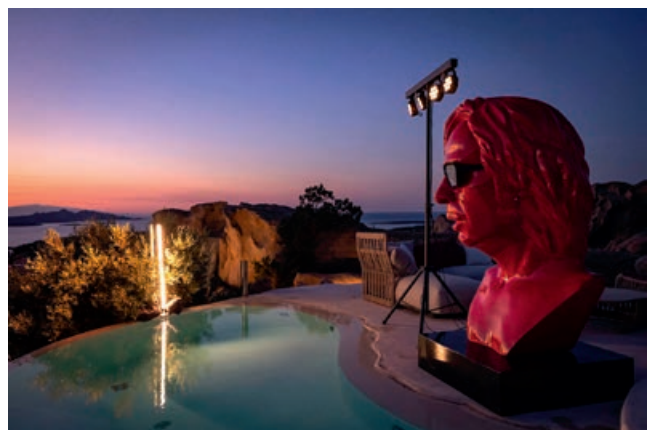
How Four European Films Turned Momentum into Cinema Success

European exhibition in 2025 was steady rather than spectacular, but one trend stood out: local and European titles still moved the needle when audiences felt they were experiencing an event rather than just seeing another film on release.



Sentimental Value © Memento, Kasper Tuxen Andersen

UNIC's preliminary figures put the 2025 box office for 39 European territories at nearly €6.9 billion, down only 1% year on year, while several markets reported strong performances from local films. Notably: Italy's local market share rose to 32.7%; Denmark's reached a record 37%; Norway's climbed to 28.8%; and Croatia's national productions and co-productions accounted for 7% of the box office. Against that backdrop, four very different films – Gennaro Nunziante's *Buen Camino*, Joachim Trier's *Sentimental Value*, Harry Lighton's *Pillion* and Igor Bezinović's *Fiume o morte!* – offer useful case studies in how buzz is built before and around theatrical releases. Their campaigns vary greatly in scale and intent, but all show that momentum emerges from a mix of positioning, timing, festival exposure, press narratives and cinemas' ability to turn a film into a public moment.



Buen Camino © Medusa Film



Buen Camino © Medusa Film

1 Turning a comedy into a national event

Buen Camino is the clearest example of a film performing as a domestic phenomenon. Released in Italy on Christmas Day, the Checco Zalone comedy was marketed as a national occasion rather than a standard launch. The campaign unfolded through successive attention peaks: pre-sales opened in mid-November; the trailer dropped on December 4th; and urban, out-of-home activity intensified through the month, including a branded takeover of Milan's M4 line and a wider DOOH (public digital screen advertising) campaign running from December 8th – 28th. A Mediaset multi-channel "video-message" stunt on December 17th created another national spike just days before release. The campaign's strength was its measurability. The trailer drew around 1.1 million views, and it quickly converted awareness into admissions: after four weeks it had grossed €68.8 million from 8.56 million admissions, before surpassing €76.4 million and 9.5 million admissions. Distributor Medusa also claimed a 70% market share over the holiday period, with the film remaining number one well into week five. For exhibitors, the lesson is clear: a mass-marketed local title can still dominate when campaign beats circle around a strategic date and cinemas frame the release as part of a seasonal cycle.

2 Festival prestige turned into box-office momentum

Sentimental Value illustrates the opposite trajectory: a prestige film using festival momentum to expand its theatrical footprint over time. The drama premiered in Cannes, where it won the Grand Prix, then built visibility through autumn festivals, awards-season positioning, and staggered territorial releases. The campaign's key strength was its ability to convert critical acclaim into repeated points of audience agreement. By the time the film reached cinemas across Europe, it brought with it accumulative acclaim – Cannes recognition, critical consensus, festival exposure, European Film Awards success and pre-Oscar visibility.

That momentum translated into tangible results. The film, in receipt of MEDIA development and distribution support through Films on the Move, grossed \$22.44 million worldwide and surpassed 250,000 admissions in Norway alone, while also entering weekly top-10 charts in France, Germany, Spain, Italy, and the UK & Ireland between late 2025 and early 2026. Online interest also reflected that growing visibility, with the official trailer drawing roughly 1.4 million views. The recent Oscar win for Best International Feature is likely to extend that momentum further, feeding both theatrical interest in remaining territories and, later, streaming viewership. In this sense, theatrical release was not the endpoint but the mechanism through which symbolic prestige repeatedly converted into audience confidence.



Pillion © Memento Distribution

3 Targeted marketing for a specialised audience

Pillion represents a third model: a specialised debut that used festival recognition to legitimise a niche proposition before relying on targeted community alignment and flexible marketing tools. The film premiered in *Un Certain Regard* and won the strand's screenplay prize, instantly framing it as a discovery. That mattered because its premise – a queer BDSM love story balancing humour and tenderness – required careful positioning to reach audiences beyond a small core base. Rather than softening the concept, the campaign emphasised its distinctiveness while equipping distributors with adaptable materials. This approach prioritised precision over reach, aiming to mobilise specific audiences rather than raising general awareness. The Italian rollout is instructive: distributor I Wonder Pictures provided multiple poster formats, web banners, a pressbook and trailers in several aspect ratios, including 9:16 and square assets designed for digital platforms. Commercially, the A24 trailer registered about 687,000 indexed views and the film grossed roughly \$6.19 million worldwide – modest but consistent with a targeted campaign focused on efficiency rather than scale.

4 Hybrid distribution beyond traditional theatrical release

Already backed by MEDIA at the development stage, *Fiume o Morte!* points to a fourth pattern increasingly relevant for documentaries and hybrid works: a campaign where the theatrical release remains central but operates within a broader circulation ecosystem. According to Lightdox, the film's global sales agent, its trajectory was decisively shaped by the Tiger Award at Rotterdam, which immediately positioned the film beyond the documentary sector and gave it wider industry credibility. Momentum then built through awards, theatrical bookings, local resonance and grassroots circulation. In Croatia, the film became the country's most-watched documentary ever, drawing close to 39,000 admissions. Its domestic run was reinforced by six awards at the Pula Film Festival and later by Best Documentary at the European Film Awards, extending its visibility well beyond the festival circuit. Importantly, the campaign did not rely solely on conventional distributor-led releases. Screenings in schools, community venues and other grassroots contexts complemented theatrical play, forming a hybrid distribution path shaped by the film's subject and form. For exhibitors, this demonstrates how targeted theatrical exposure – particularly with Q&As or festival framing – can generate the legitimacy and visibility that alternative circuits later amplify.



Fiume o Morte! © Lightdox



Sentimental Value © Memento, Kasper Tuxen Andersen



Pillion © Memento Distribution

5 Cinemas and festivals as engines of buzz

All in all, these four titles show that buzz in today's European market is built through combinations rather than formulas. *Buen Camino* demonstrates how a local comedy can encourage a national cinema-going habit through concentrated marketing and strategic timing. *Sentimental Value* proves how festival prestige, carefully extended, can produce sustained theatrical momentum across territories. *Pillion* highlights the effectiveness of precise, modular marketing for films that need to reach the right audience rather than the largest one. And *Fiume o morte!* illustrates how, even through hybrid circulation models, cinemas remain crucial for creating visibility, eventisation and collective legitimacy. In each instance, theatrical exhibition is not simply where buzz is monetised – it is one of the places where buzz is made.

Davide Abbatescianni

International Reporter at Cineuropa

Barcelona to host the next edition



Lucia Recalde at the 2024 Network Conference in Vilnius © Gediminas Gražys

Held once every two years, the Europa Cinemas Network Conference gathers more than 500 professionals from over 30 countries, including exhibitors, distributors, sales agents and representatives of cultural and political institutions, to discuss the circulation of European films and audience development in cinemas.

The 24th edition will take place in Barcelona, from Thursday 26th to Sunday 29th November 2026, offering four days of discussions, workshops and collaborative sessions focused on the evolving role of cinemas in a changing world.

The Spanish Creative Europe MEDIA Desks have expressed an enthusiastic welcome for the event. "We are truly delighted that Spain is hosting this important gathering of the Europa Cinemas network," they note, highlighting it as: "A wonderful opportunity to bring together exhibitors and professionals from across Europe and to celebrate cinemas as vital cultural spaces."

From **Ainhoa Gonzalez's** (MEDIA Euskal Herria) perspective, "Having our own – and only – mini-network, with 13 cinemas participating, reinforces collaboration and exchange within the European cinema community."

For **Carmen Murillo** (MEDIA Andalucía), "As Spain has a dynamic exhibition landscape, it is a privilege to host this major event, which fosters collaboration among professionals across the continent." The conference is also seen as a key moment to: "Debate, explore new ways of engaging audiences, and ensure that European films continue to travel and resonate," as **Peter Andermatt** (MEDIA Desk Spain) explains.

The event will also shine a light on Spain's long-lasting presence within the network. As **Alex Navarro** (MEDIA Catalunya) keenly points out, "In 2026, we celebrate 100 years of Verdi Cinemas and 80 years of Cinema Maldà."

Registration is scheduled to open in late May/early June 2026.

Nathan Germain

The Europa Cinemas Label, established in 2003 for the Directors' Fortnight at Cannes, has recognized notable films such as Valéry Carnoy's *Wild Foxes* (2025), Jonás Trueba's *The Other Way Around* (2024), Elena Martín Gimeno's *Creatura* (2023), and Mia Hansen-Løve's *Un Beau Matin* (2022), among others.

Europa Cinemas aims for these films to receive the recognition they deserve on their theatrical release journey. As such, the bonus awarded for screening these films was revised in 2023: cinemas now receive €200 to support the screening of a Label film, with a minimum of seven or 14 screenings, depending on the size of their cinema. For further details, please refer to our guidelines, accessible on our website. Meet the four Network exhibitors set to present the 23rd Europa Cinemas Label to an exceptional European film at the Directors' Fortnight in 2026:



Alicia Hernanz

(Programmer and Co-ordinator,
Le Lucernaire, Paris, France)

Alicia Hernanz began her career in Madrid at Cines Verdi, working in film exhibition and distribution.

In 2008, she completed the Atelier Ludwigsburg–Paris workshop at La Fémis, France. She later moved to France, where she spent 13 years at Diaphana Distribution, developing her expertise in promoting and distributing the best arthouse films. In 2023, Alicia returned to her original field of practice, managing the Majestic Bastille cinema in Paris and, since August 2025, is the new head of programming at Le Lucernaire in Paris' 6th arrondissement.



Māris Prombergs

(Head of Cinema & Programmer,
Kino Bize, Riga, Latvia)

Māris Prombergs is a co-founder and the head of arthouse cinema at Kino Bize in the city centre of Riga, Latvia. Māris, with a

background in management, communication, anthropology, and voluntary social work, started weekly screenings of the Dirty Deal Cinema Club in 2009 in collaboration with local embassies and film institutions. Kino Bize, a full-time cinema, was founded in 2012. Māris has published film-related articles, given lectures, and participated in public debates.



Octavian Dăncilă

(Film Curator & Programme Manager,
Cinema Victoria, Cluj-Napoca,
Romania)

Octavian Dăncilă is the co-founder of Silver Screen and the Pasaje International Film Festival in Romania.

With over 10 years of experience in the film industry, he has worked in festival programming for the Transilvania International Film Festival and the BFI London Film Festival. He is currently a film curator and programming manager at Cinema Victoria in Cluj-Napoca. Octavian holds an MA in Film Programming and Curation from the National Film & Television School (UK) and is also an associate professor at Babeş-Bolyai University.



Panos Achtsioglou

(Head Programmer of annual
activities / Cinémathèque Curator,
Olympion Cinema, Thessaloniki,
Greece)

Panos Achtsioglou is a film programmer and curator with experience across international

festivals, cinémathèques and independent cinemas. As Head Programmer of the Thessaloniki International Film Festival's annual activities and Curator of the Thessaloniki Cinémathèque, he develops audience-driven programmes spanning first-run films, retrospectives, special events and premieres. His curatorial work combines artistic ambition with community engagement and long-term audience development. Cinema Olympion received the Europa Cinemas Award for Best Programming in 2020.

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