
Roskino and Nevafilm Research
present

THE RUSSIAN FILM INDUSTRY IN 2014

May 2015
68th Cannes Film Festival

STATE SUPPORT

DOMESTIC FILM INDUSTRY LEADERS

	2013	2014	2015
Art Pictures Studio	■	■	■
Direktsiya Kino	■	■	■
CTB Film Company	■	■	■
Non-Stop Production	■	■	■
Igor Tolstunov Production Company (PROFIT)	■	■	□
Real Dakota	■	□	□
Rekun Cinema	■	□	□
Strela	■	□	□
Nikita Mikhalkov's Studio Trite	■	■	■
TABBAK	■	■	■
Rock Films	■	□	□
Central Partnership	■	■	■
Enjoy Movies	■	■	■

3.2

billion RUB

in Russian Ministry of Culture funding to support debut, experimental, children's and documentary films

808

million RUB

were recovered by the Cinema Fund and subsequently reinvested in the film industry

3.0



Cinema Fund subsidies granted on a repayment basis

billion RUB

in Cinema Fund subsidies for commercial feature-length and animated films, and films made by independent producers and leaders in the domestic film industry

State investment (billion RUB)	2013	2014	2015 (planned)
Ministry of Culture funds	3.0503	3.2193	2.2706
Cinema Fund grant subsidies	2.1615	1.8	1.8
Cinema Fund loan subsidies	0.8385	1.2	1.2
Cinema Fund reinvested money	0.201	0.808	to be determined during the year
Total state support	6.2513	7.0273	5.2706

Sources: Ministry of Culture, Cinema Fund

FILM PRODUCTION (EXCLUDING REGIONAL PROJECTS)

+ 29%

domestic cinema premieres

Since 2010, reforms to the state support system have led to increased government funding and private investment in the film industry

	2012	2013	2014
Number of films produced (feature-length) *	111**	123	117
Number of Russian films in distribution **	76	77	110
Number of new domestic releases **	69	65	84
Total expenditure on production of films in distribution (billion RUB) *	8.3	10.8	n/a
Average budget of films in distribution (million RUB) *	75	88	n/a

Sources: *Movie Research, **Nevafilm Research

REGIONAL FILM PRODUCTION

	2012	2013	2014
Number of regional films in distribution	20	28	34
Admissions (thousands)	55.0	131.8	105.3
Box office returns (million RUB)	10.6	27.1	21.3

Source: Nevafilm Research

Digital technology has served as an impetus for regional, low-budget filmmakers, the largest of which are in the Sakha Republic and the Republic of Buryatia

FILMS IN DISTRIBUTION

-3.5% number of new releases in theatrical distribution in 2014

	2012	2013	2014
Number of films in distribution	424	491	521
Number of new releases	398	429	414
3D/IMAX releases	63/20	64/20	66/24
Atmos/Auro releases	0/3	19/3	25/5
D-Box/4DX releases	3/4	22/31	31/31

Digital technology is no longer helping to increase the number of films released

Sources: Film Business Today, Booker's Bulletin, CAIS, Rentrak, Nevafilm Research

CINEMA ADMISSIONS AND BOX OFFICE RETURNS

+2.5% box office returns **-0.15%** cinema admissions

The Russian market is no longer growing automatically with the expansion of cinema chains

	2012	2013	2014
Admissions (millions)	160.2	176.3	176.0
Box office returns (billion RUB)	37.5	42.3	43.3
Box office returns (billion EUR, at average annual exchange rate)	1.2053	1.3249	1.2457

Sources: Film Business Today, Booker's Bulletin, CAIS, Rentrak, Nevafilm Research

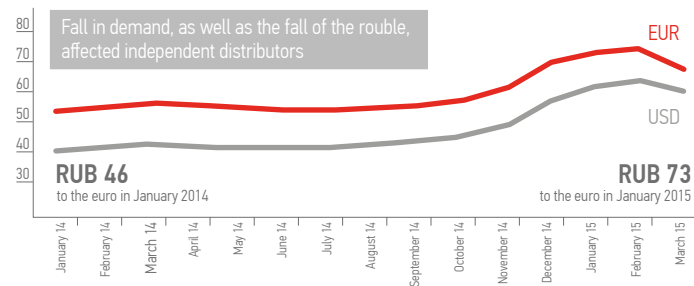
FILMS IN DISTRIBUTION BY COUNTRY

18.7% admissions share for domestic films **64%** admissions share for Hollywood films, which account for less than 20% of titles

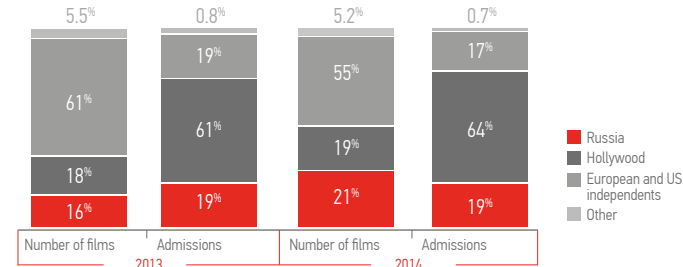
Russian films maintained their market share thanks to an increase in the proportion of Russian films in distribution (up from 16% to 21%)

Exchange rate trends in Russia

Sources: Central Bank of Russia



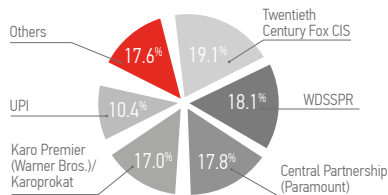
Share of Russian market by country of production



Sources: Film Business Today, Booker's Bulletin, CAIS, Rentrak, Nevafilm Research

DISTRIBUTORS

Largest Russian distributors in 2014 (box office returns)



Sources: Film Business Today, Booker's Bulletin, CAIS, Rentrak, NevaFilm Research

Paradise, Volga, and West are the leaders in independent distribution, and among the top ten distributors.

82%
of box office returns
go to five major distributors

EXHIBITION

	2012	2013	2014
Cinemas	1,015	1,081	1,187
Screens	3,084	3,453	3,829
Digital cinemas	869	1,006	1,157
Digital screens	2,092	2,969	3,694

96%
of screens are digital

Source: NevaFilm Research

Top 10 cinema chains as of 1 January 2015 (including franchises and cinemas which use schedule planning services)

	Cinemas	Screens	Market share
Cinema Park	30	280	7.3%
Formula Kino	34	253	6.6%
Karo Film	30	221	5.8%
Kinomax	29	190	5.0%
Premier Zal	105	158	4.1%
Luxor	22	152	4.0%
Cinema Star	21	109	2.8%
Monitor	26	98	2.6%
Mirage Cinema	14	95	2.5%
Pyat Zvezd	11	66	1.7%

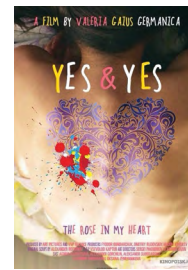
Source: NevaFilm Research

MAIN INTERNATIONAL PRIZES AWARDED TO RUSSIAN FILMS IN 2014



Leviathan (directed by Andrey Zvyagintsev)

London Critics' Circle Film Award for Foreign Language Film of the Year, Best Screenplay at Cannes, European Film Academy and Oscar nominations



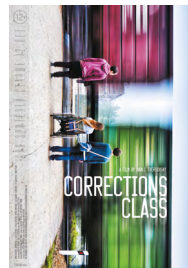
Yes and Yes (directed by Valeria Gai Germanika)

Best Director, FIPRESCI prize, nominated for Best Film at the Moscow International Film Festival (MIFF)



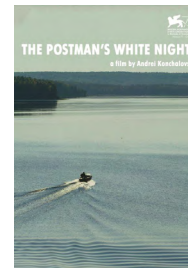
The Fool (directed by Yuri Bykov)

Prizes from the Ecumenical Jury and Youth Jury at the Locarno Film Festival, nominated for Best Film at the MIFF



Corrections Class (directed by Ivan Tverdovsky)

Winner of the East of the West competition at the Karlovy Vary International Film Festival



The Postman's White Nights (directed by Andrey Konchalovsky)

Best Director at the Venice International Film Festival



White moss (directed by Vladimir Tumaev)

Nominated for Best Film at the MIFF

ROSKINO

14 Kalashny Lane,
Moscow, 125009 Russia
Tel: +7 (495) 690-5009
Email: info@roskino.org
www.roskino.org

NEVAFILM RESEARCH

33-2B Korablestroiteley St.,
St. Petersburg, 199397 Russia
Tel: +7 (812) 449-7070
Fax: +7 (812) 352-6969
Email: research@nevafilem.ru
www.nevafilem.com

Text by Xenia Leontyeva
English translation
by Eclectic Translations
Layout and design by Irina Shmidt

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