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Production Financing & Commissioning in European Union & the United Kingdom:

Vitrina Insights & Trends

https://vitrina.ai/

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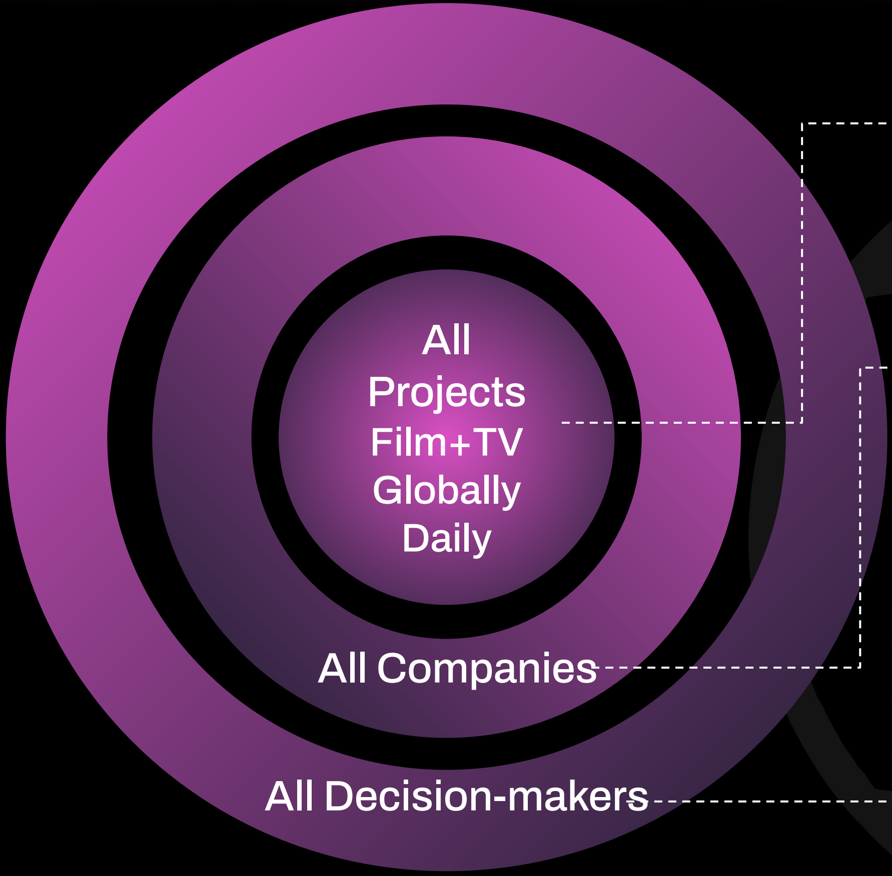
Connecting the Global Video Entertainment Supply-Chain

Vitrina's Global Film+TV Project Tracker



Real-time Tracking of Projects in Development, Production (Commissioned, Financed, Green-lit), Post, Released

Streamers, Broadcasters, ProdCos, TV+Film Studios, Service-Providers, Distributors, Tech Companies

Dealmakers, CXOs in Production, Acquisition. Crew-Heads in Prod, Post, Localization, Art, VFX, etc

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The Vitrina Platform: Consists of Two Massive Real-Time Tracking Initiatives: 1. Film/TV Projects & 2. M&E Companies

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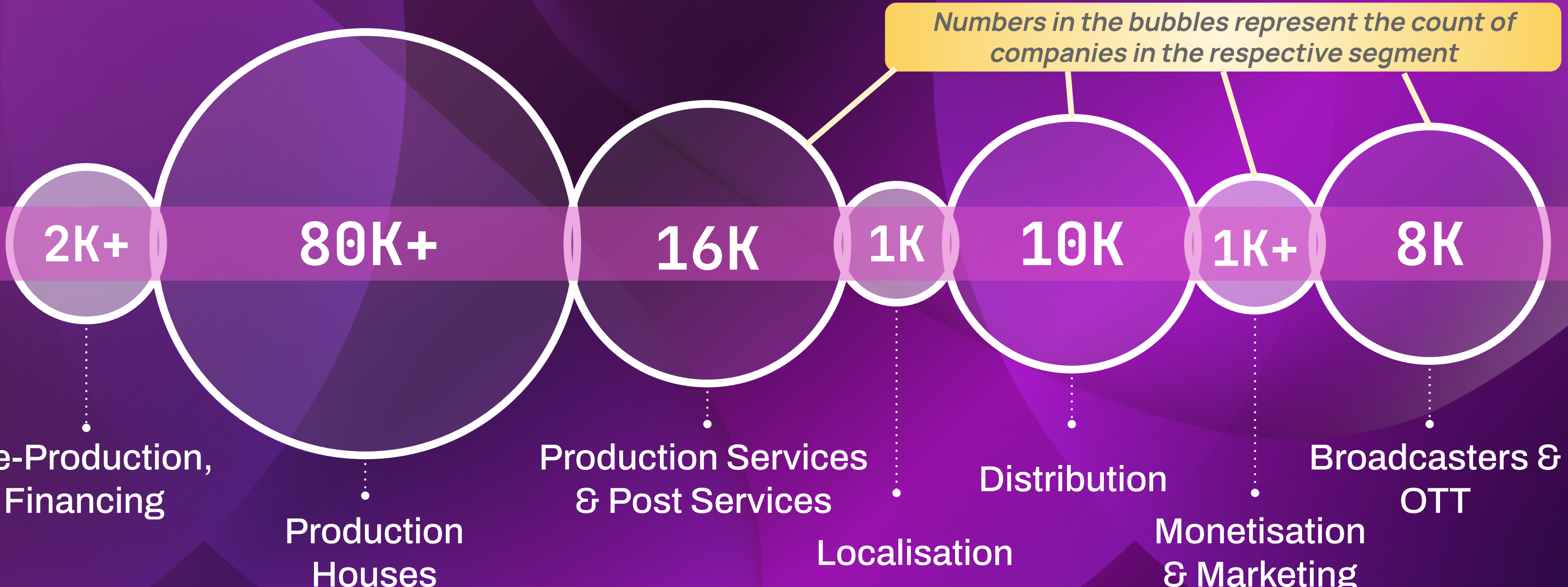
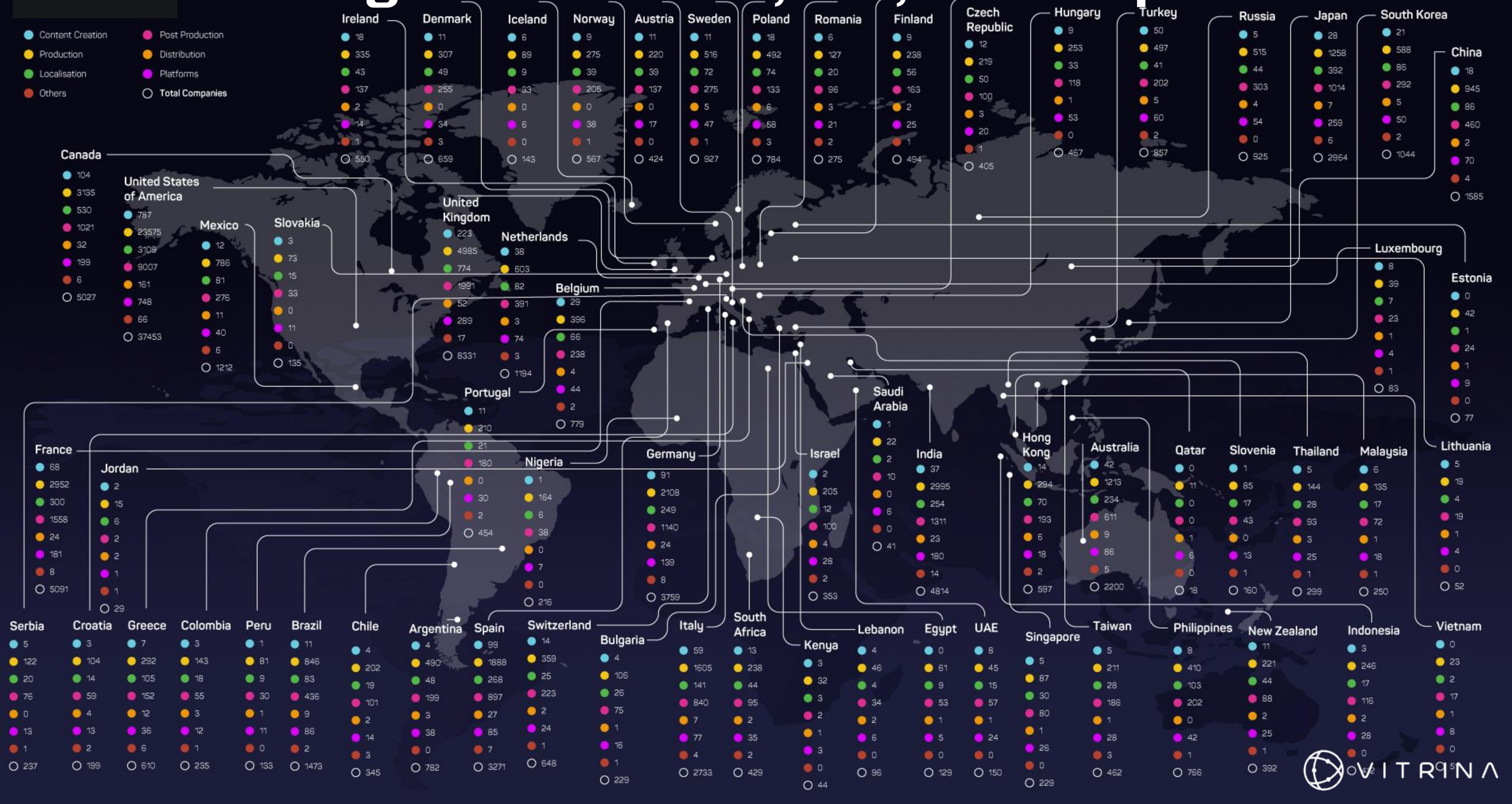
Global Projects Tracker

IP Development | **Productions** | **Post** | **Releases**

Content Supply-Chain (130K Cos)



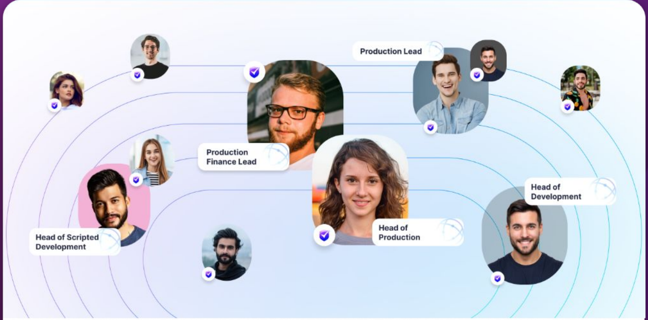
Vitrina Coverage: 100 Markets, 140,000 Companies



Global Film+TV Project Tracker

Film+TV | Global | Daily

Popular for: Sales Lead Generation for Vendors
Competitors Upcoming Slate for Streamers



Decision-Maker Contacts

Execs | Dealmakers | Crew-Heads

Popular for: Sales Outreach for Vendors
Finding Crew Experts for Streamers and Prod-Cos

Company Search and Profiling

Buyers | Vendors | Partners

Popular for: BD and Sales at Vendors
Finding Specialist Vendors for Streamers and Prod-Cos

Webinars, Reports

Global Film+TV Production Trends

Popular with: Leaders in Production Finance, Strategy, Licensing, Board Members, Investors

NETFLIX
itv STUDIOS
PANAVISION
WARNER BROS. DISCOVERY
crafty apes
Disney
gettyimages

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Top Factors Driving Growth in the EU & UK Film & TV Sector (2025)

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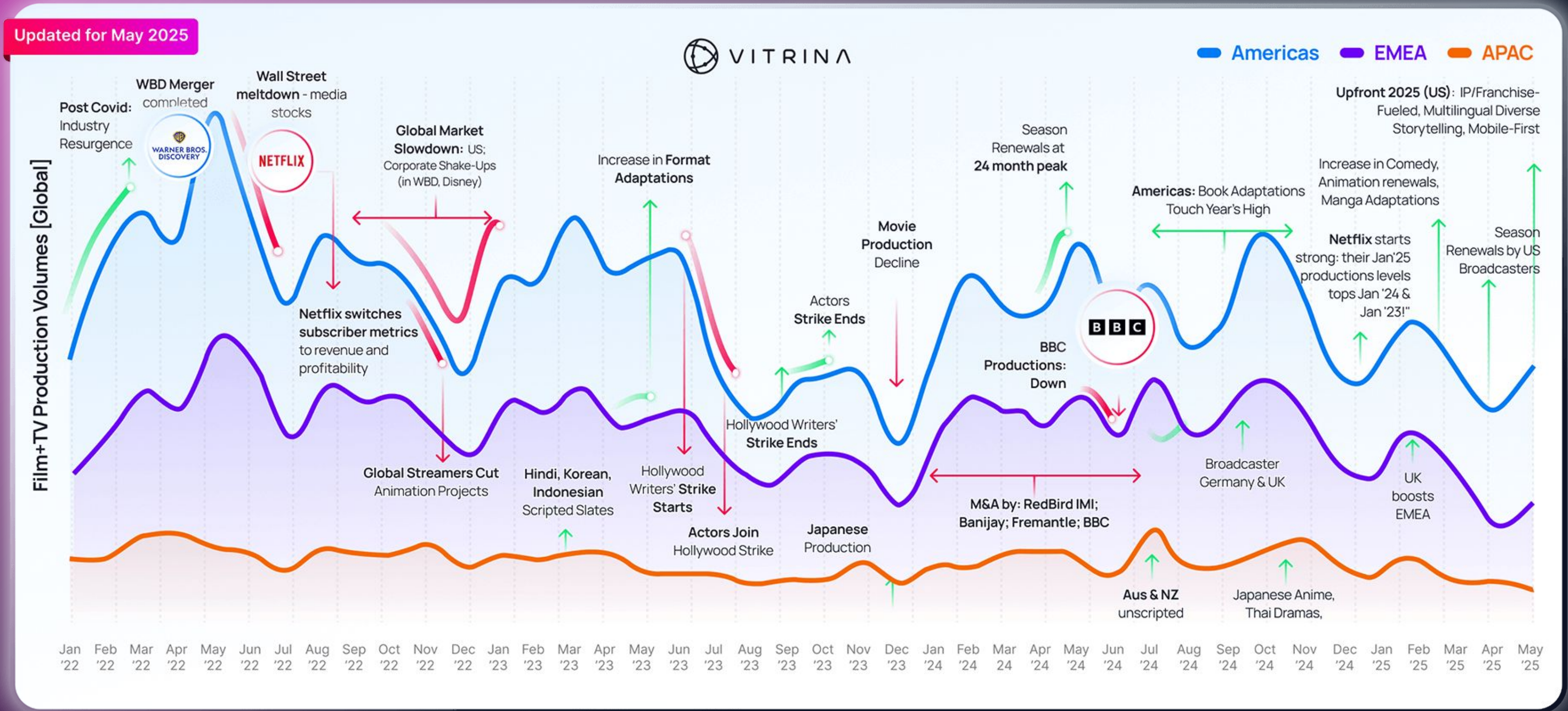
1. **Streaming Boom & Hybrid Monetization**
    - EU growth led by Spain (+16%) & Italy (+14%) in 2024.
    - UK's ITVX & Channel 5 report double-digit digital gains.
    - Netflix sees 50% of new EU subscribers choosing ad-tier plans.
2. **Robust Inward Investment & Tax Incentives**
    - UK production spend tripled in Q1 2025 (£632M), driven by inward investment.
    - New UK tax credits (VFX, Indie Film) and Pinewood's Indie Hub fueling growth.
3. **Strategic IP Development & Premium Content Investment**
    - Canal+'s STUDIOCANAL expands with 9,400-title library and new labels.
    - UK's ITV Studios and Fremantle scaling up global IP and sports content.
4. **Technological Advancements & AI Adoption**
    - EU studios deploy AI across scripting, commercials, and creative tasks.
    - UK's Cinesite and Framestore invest in GenAI units to enhance VFX and pre-prod.
5. **Virtual Production & Studio Infrastructure Expansion**
    - Nordisk Film launches the world's first 360° LED stage.
    - ADF plc and Pinewood Studios ramp up capacity for global shoots.
6. **Cross-Border & Platform Alliances**
    - EU: RTL–ProSiebenSat.1 ad-tech partnership; Viaplay expands via Prime, Roku.
    - UK: Freely (BBC, ITV, C4, C5) delivers 16 new streamed channels.
7. **Sports as a Strategic Growth Pillar**
    - EU: Viaplay & RTL prioritize long-term sports rights.
    - UK: Fremantle Sports aims to develop global sports-based content.

Top Headwinds Facing the EU & UK Film & TV Sector (2025)

1. **Macroeconomic Pressures & Inflation**
   - EU market shrank in real terms in 2023 despite 4.3% nominal growth.
   - UK studios and vendors report rising production costs, budget constraints, and revised expansion plans.
2. **Declining TV Advertising Revenues**
   - RTL and ProSiebenSat.1 face sharp Q1 2025 declines in ad income.
   - Traditional segments (TV ads, public funding) stagnate across EU & UK.
3. **Workforce Volatility & Talent Shortages**
   - Up to 66% of UK freelancers consider leaving the industry; 50% of UK production workforce is freelance.
   - Across EU & UK: short-term contracts, lack of training, and poor working culture deter new entrants.
4. **Skill Gaps in Strategic & Technical Roles**
   - Shortages in script development, digital imaging, and leadership roles.
   - Education systems struggle to keep pace with industry transformation.
5. **Underconsumption of European Content**
   - European films make up 43% of SVOD catalogues but just 33% of viewing time.
   - Smaller EU markets attract limited investment from global streamers.
6. **Delays in Adopting New Tech**
   - EU and UK companies cite high costs, ethical concerns, and skill shortages slowing adoption of AI, virtual production, and cloud-native systems.

Global Film & TV Production Snapshot: Last 41 Months



Source: Vitrina Global Film+TV Projects Tracker

May 2025 Productions: Key Highlights

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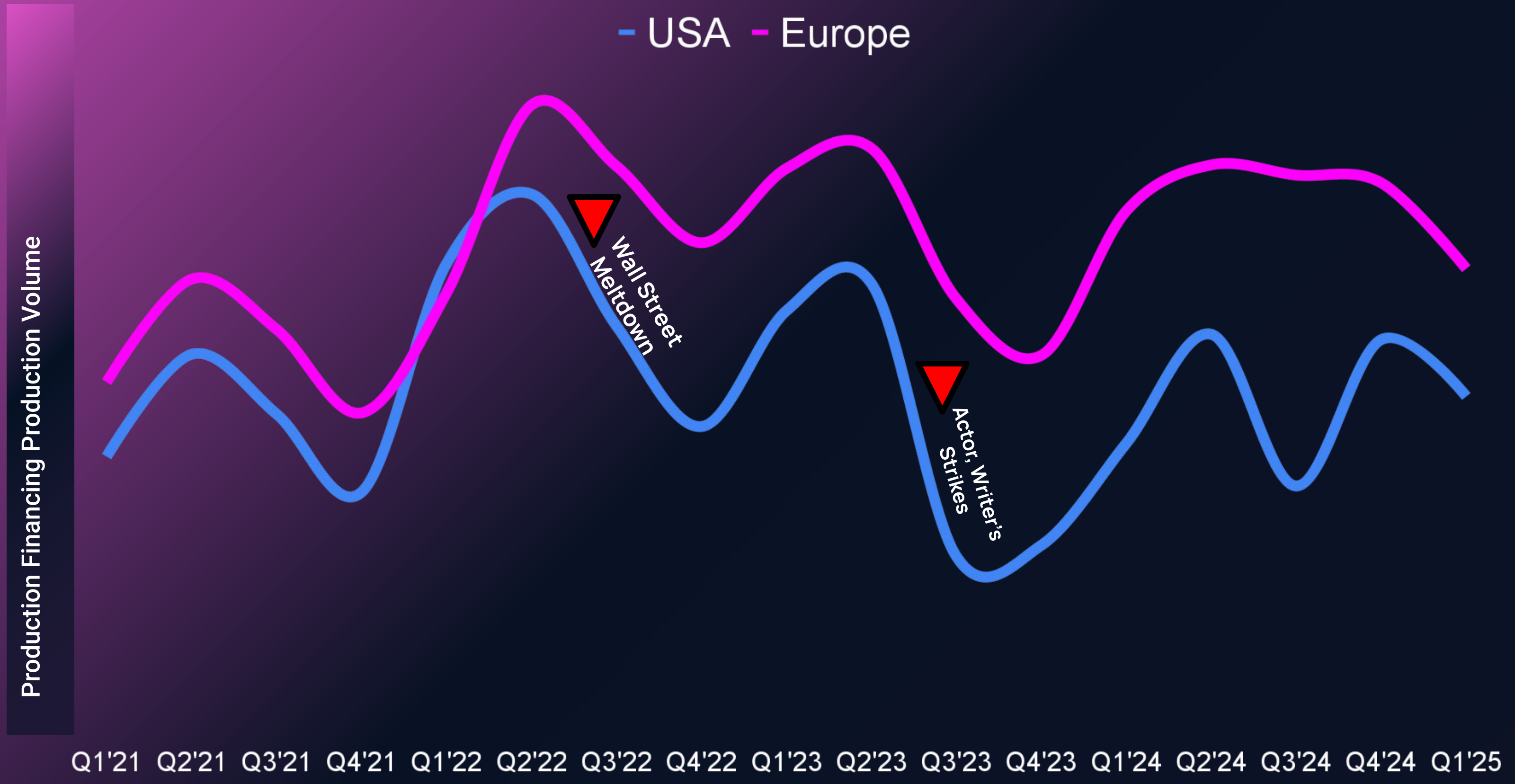
- **Global Production Trends – May 2025**
  - Global productions grew +20% vs April '25; Growth driven by U.S.-based global platforms, especially commissioning in international markets.
  - Rise in book adaptations and co-productions.
- **Genre and Language Trends:**
  - English-language productions rose due to U.S. commissioning; Spanish, French content remained stable.
  - Top Genres: Drama & Comedy led again; Scripted vs Unscripted mix remained balanced.
- **Top Players Overall:** [SCR: 77% : UNSCR : 23%]
  - Netflix increased production activity and retained leadership
  - Prime Video, BBC, Channel 4, ZDF, ARD maintained top-tier status. New Entrants: Bravo, Apple TV+.
- **Within AMERICAS:** [SCR: 78% : UNSCR : 22%]
  - +34% increase in new and overall productions
  - Key drivers: Netflix, Prime Video, NBC, Bravo, Apple TV+, Fox Network.
  - English-language dominant; Spanish & Portuguese contributions stable.
- **Within EMEA:** [SCR: 73% : UNSCR : 27%]
  - +29% growth in production activity. Surge led by broadcasters: BBC, Channel 4, ARD, ZDF, UKTV
  - Spike in English-language content from UK-based and global platforms.
- **Within APAC:** [SCR: 92% : UNSCR : 8%]
  - Netflix ramped up regional commissioning.
  - Korean-language scripted content gained momentum.

Production Volume Trends : Europe vs. USA

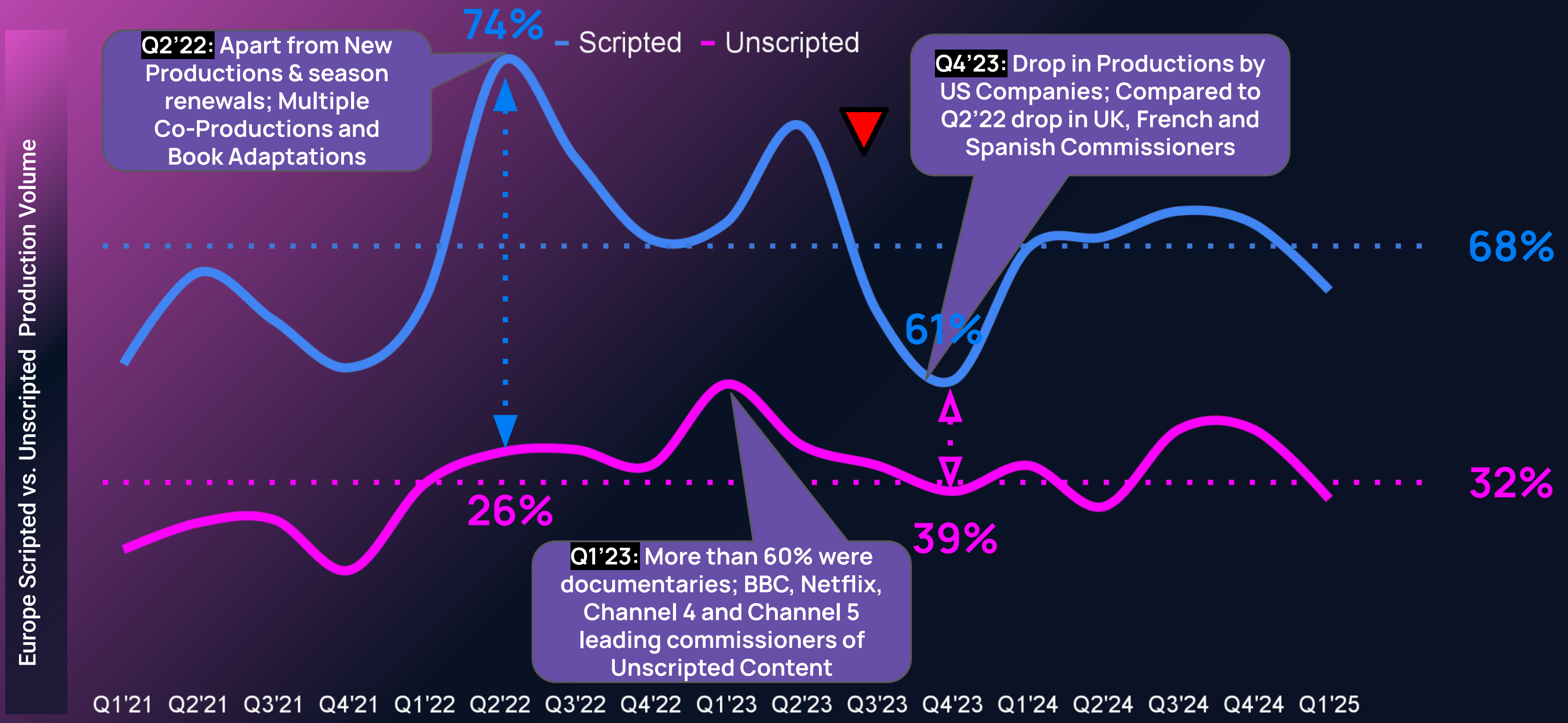
Lower Volatility and Faster Rebounds Position EU as More Crisis-Resilient



Source: Vitrina Daily Production Tracker

Europe Production Trends (Scripted VS. Unscripted)

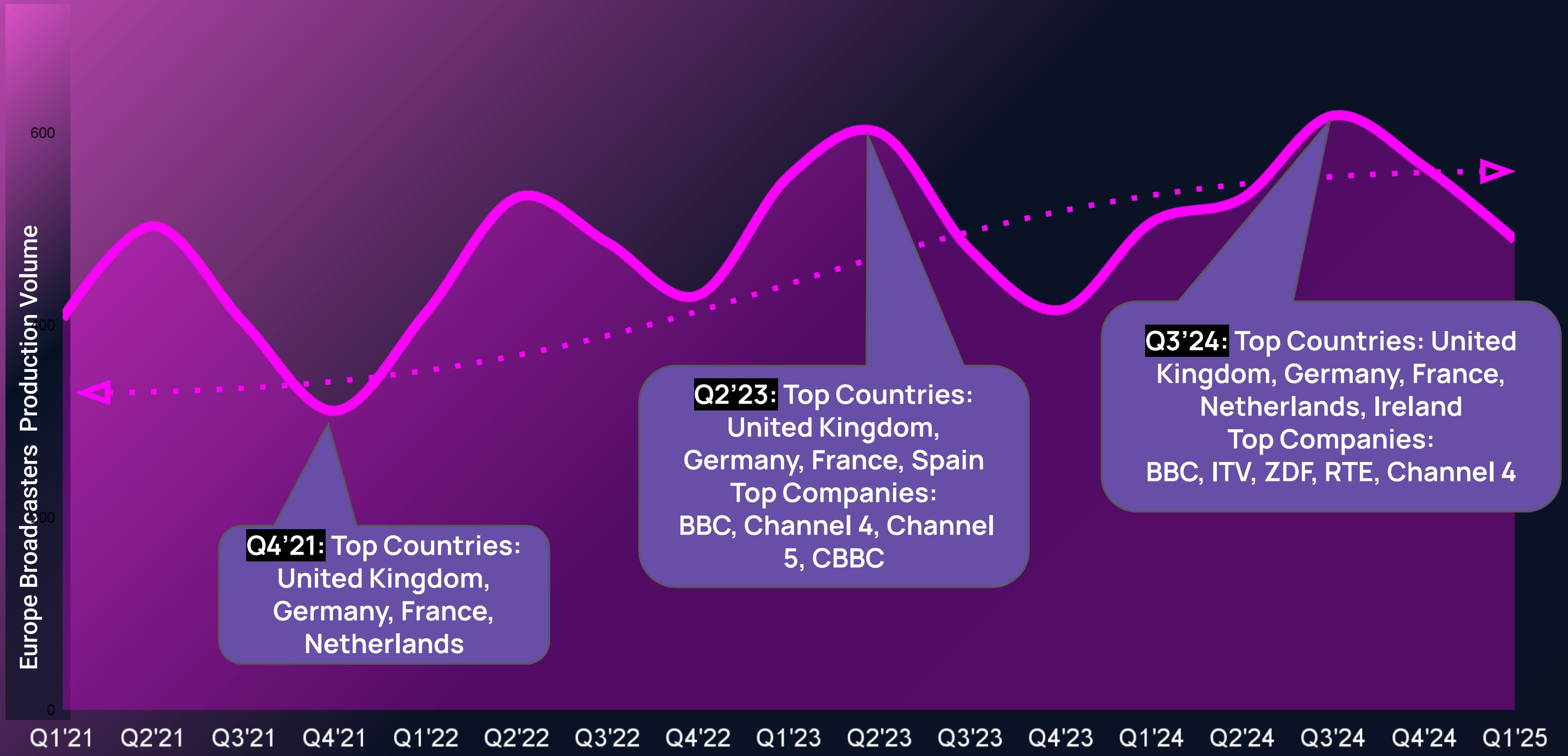
Unscripted Delivers Steady Returns in a Fluctuating Market



Source: Vitrina Daily Production Tracker

Europe Commissioning Trends for Broadcasters

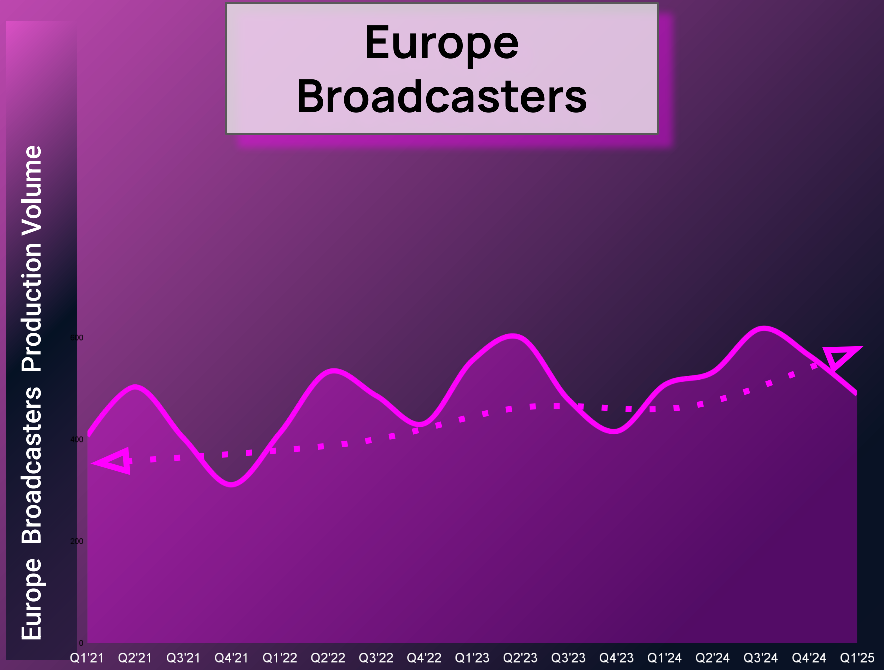
European Broadcast Market Shows Signs of Sustained Recovery



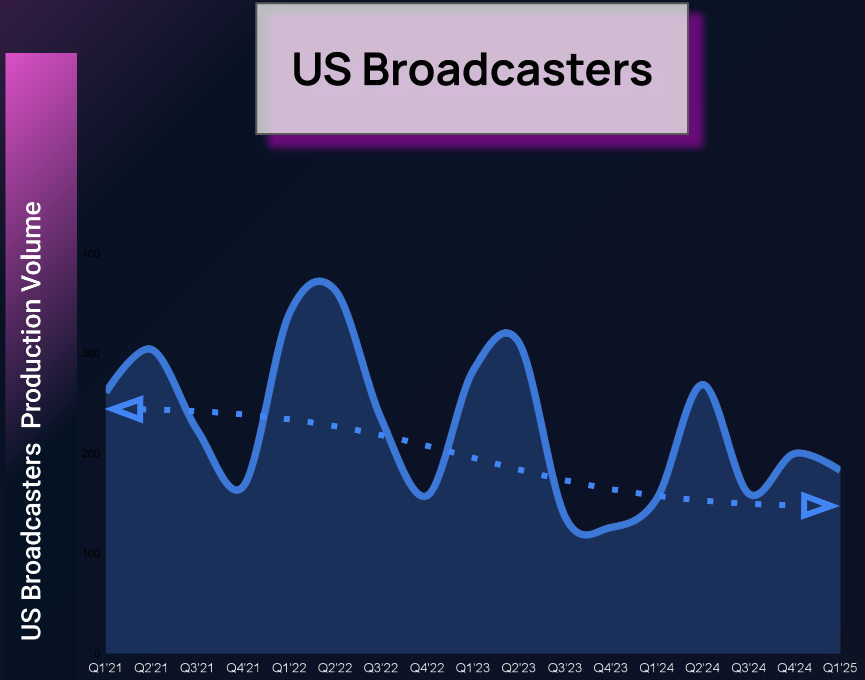
Source: Vitrina Daily Production Tracker

Europe vs US Production Trends (Broadcasters)

US Broadcasters are on a downward trend



Q1’25 vs. Q1’21
20%



Q1’25 vs. Q1’21
30%

Source: Vitrina Daily Production Tracker

European Productions by Global Groups

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Company	Key Entities	Yr 2021	Yr 2022	Yr 2023	Yr 2024
Netflix	Netflix	100+	150+	175+	150+
Prime Video	Prime Video, Amazon Studios	50+	100+	100+	100+
Walt Disney	Disney+, National Geographic, Hulu, Hearst Networks EMEA	50+	75+	100+	75+
Comcast	Sky, Now, Sky Studios, Sky Italia	150+	200+	200+	150+
Sony	Sony Pictures International Productions, Sony Pictures Television, Bad Wolf	25+	25+	50+	50+
Vivendi	Canal+, Cine+ OCS, OCS Network, StudioCanal	225+	300+	375+	325+
Warner Bros Discovery	Discovery+, TVN, Warner Bros. Discovery EMEA	200+	250+	225+	200+
Paramount	Channel 5, Paramount+, ViacomCBS International Studios, Showtime Documentary Films	200+	125+	125+	100+

European Productions by Top European Studios

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Company	Key Studio Entities Considered	Yr 2024 Overall
Banijay	Tiger Aspect Productions, Filmlance International, Zodiak Kids & Family France, Endemol Shine, Endemol France, Banijay Italia, Rubicon TV	325+
Bertlesman	Fremantle, Atresmedia, Wildside, UFA Fiction, Picomedia, The Apartment, Lux Vide	350+
BBC	BBC Studios, BBC Film, Burning Bright Productions, BBC Studios Factual Entertainment Productions	425+
ITV	ITV Studios, Blumhouse Television, Cattleya, High Noon Entertainment	225+
ZDF	ZDF Studios, Network Movie Film und Fernsehproduktion GmbH, Bavaria Fiction, Das kleine Fernsehspiel	250+
RAI	Rai Cinema, Rai Fiction, Rai Documentary	175+

Overall numbers capture Europan Projects commissioned by main group entity; covers European Productions of main Studio/ ProdCo including group companies, labels, subsidiary prodcos. Release year considered as 2024.

Top European Production Hubs Ranked:

Based on 2024 Releases

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	Netflix	Prime Video	Walt Disney	Comcast	Sony	Vivendi	Warner Bros Discovery
United Kingdom	1	2	1	1	1	*	1
Spain	3	1	*	*	*	*	*
Germany	5	5	*	*		*	3
Italy	4	3	*	2	*	*	4
France	2	4	*	*	*	1	*
Belgium	*	*	*		*	2	*
Poland	*	*				3	2

'' Indicates low production volume in respective country for the group*

Canal+ Group – Africa Expansion

"Africa is by far the largest growth opportunity for PAY TV in the decades to come. We have built a leadership position in French-speaking markets, and we are eager to join forces with MultiChoice."

David Mignot, CEO of Canal+ Africa March 28, 2025

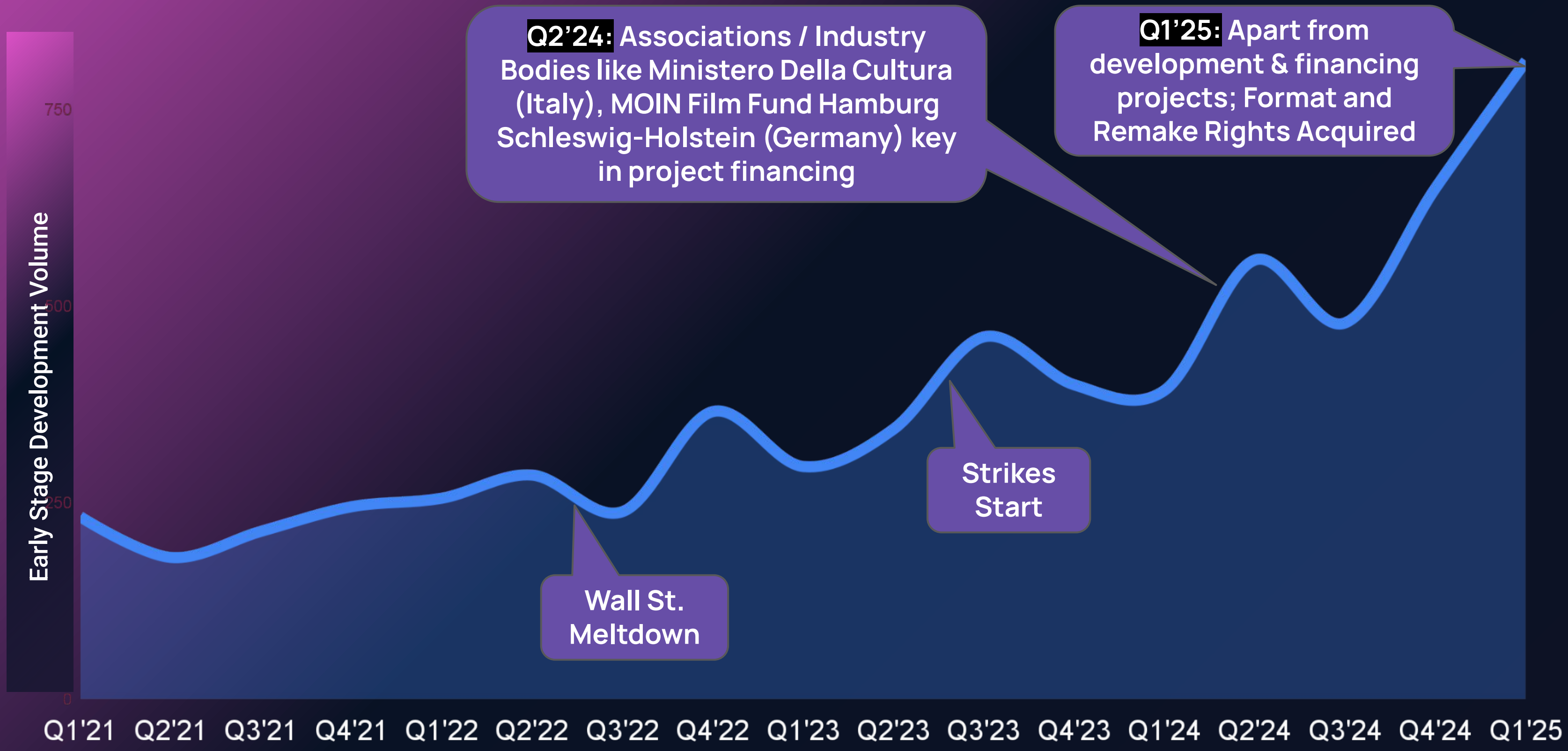
RTL Group – Streaming Growth Targets

"By 2026, we aim to reach 9 million paying subscribers and around €750 million of streaming revenue. We plan to increase our content spend to around €500 million, and to become profitable by 2026."

RTL Group (Company Statement) May 5, 2025

Trends in Early-Stage Development Financing

Yr 2025 Driven by Financing from Industry Bodies, Development by Top Companies, Co-Development Deals, and Expanding Format & Remake Rights



Source: Vitrina Daily Production Tracker

Comparison of Development, Production, & Releases: Jan-May 2025 vs. Jan-May 2024

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Markets	% Change in Early Stage Development Financing	% Change In Production Financing	2025 YTD Releases as % of Annual 2024
United Kingdom	17% ↓	15% ↓	45% *[Great Start to 2025]*
Spain	112% ↑	27% ↓	31% *[Slow Start to 2025]*
France	53% ↑	33% ↓	46% *[Great Start]*
Italy	66% ↓	51% ↓	37% *[Slow]*
Germany	285% ↑	45% ↑	49% *[Great Start]*
Period Considered	Jan-May 2025 vs. Jan-May 2024	Jan-May 2025 vs. Jan-May 2024	Jan-May 2025 as a % of Jan-Dec 2024

Country Wise Production Volume Trends

Top Commissioners 2025

Top Studios 2025

Number in circle Indicates Rank of the respective country for its original productions

Top Commissioners 2025

3

1

Top Studios 2025

Source: Vitrina Daily Production Tracker

Country Wise Production Volume Trends

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Top Commissioners 2025

TF1
france télévisions
CANAL+
NETFLIX 2
france 2
france 3

Top Studios 2025

STUDIOCANAL
FEDERATION studios
3cinéma
SATISFACTION GROUP

Number in circle Indicates Rank of the respective country for its original productions

Top Commissioners 2025

NETFLIX 4
sky
NOVE
Rai

Top Studios 2025

Banijay Italia — We are Banijay
Rai Cinema
cattleya
VISION DISTRIBUTION

Source: Vitrina Daily Production Tracker

Germany Production Trends

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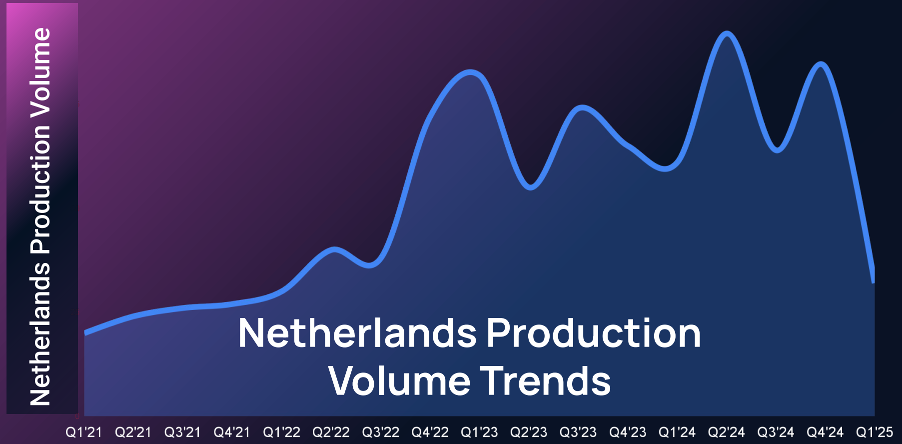
Top Commissioners 2025

ARD 1
ZDF
5 prime video
SWR SÜDWESTRUNDFUNK
Bayerischer Rundfunk
SAT.1

Top Studios 2025

ARD Degeto
UFA FICTION A Fremantle Company
itv STUDIOS GERMANY
Constantin Film
BAVARIA FICTION
Banijay Productions Germany We are Banijay



Top Commissioners 2025

SBS 6
RTL
BNNVARA

Top Studios 2025

talpa studios
KAAP HOLLAND FILM
STUDIO RUBA
keplerfilm.

Number in circle Indicates Rank of the respective country for its original productions

Source: Vitrina Daily Production Tracker

Entertainment Supply Chain Updates :

Big Moves by Netflix in Europe

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1

Netflix to invest over **€1 billion in Spain from 2025-2028** to bolster its content pipeline, expand local production, and deepen its EMEA footprint in a key market.

A strategic move to leverage Spain's proven success as a global content powerhouse, driving local economic impact while reinforcing Netflix's competitive advantage.

2

Groundbreaking alliance between **Netflix** and **French broadcaster TF1** redefines traditional content distribution, **positioning Netflix as a central hub for both linear and on-demand viewing.**

This move significantly strengthens Netflix's ad-supported growth strategy and provides TF1 with critical new reach and monetization avenues amidst fragmenting viewership.

3

Netflix is rapidly scaling its European ad business by deploying **its proprietary in-house ad tech across EMEA**, ensuring full control over ad delivery, measurement, and innovation.

Concurrently, **expanding programmatic buying capabilities** across key European markets since Feb 2025, to provide advertising flexibility and access to Netflix's growing ad inventory.

M&A/Partnerships/Launches/Expansions: EU Updates

Jan 2025	Feb 2025	Mar 2025	Apr 2025	May 2025	June 2025
🚀 **Cantilever Media** launches ***Kazoo Films***, a UK-Ireland distributor aiming to co-produce & sell animation titles.	🤝 Sylvester Stallone backs ***Largo.ai*** in a $7.5M Series A to scale AI for film/TV audience prediction (Switzerland).	🚀 **BBC Studios** partners with *Rumpus Media* founders to launch *Bango Studios*, focused on new entertainment formats (UK).	🚀 **Fremantle** unveils *Imaginae Studios*, a standalone label focused on AI-driven storytelling across genres (UK).	🚀 **Secuoya & Banca March** launch *Be&Jing 1*, a €50M fund for Spanish film/TV projects, addressing unmet financing needs.	🚀 **Netflix** to invest €1B+ in Spain to expand production at Tres Cantos and grow Spanish-language content globally.
🚀 ***Maxon*** acquires 3D asset company *Laubwerk* to integrate plant visuals into Cinema 4D, boosting global VFX workflows (Ger)	🤝 **C0_Made** merges *Art & Bob*, *Breakable Films*, and *Third Ear Studio* into *CoStudios* for scalable Nordic IP creation (Sweden).	🚀 ***Garden Studios*** adds 98,000 sq ft and 4 soundstages, doubling capacity as a major London production hub.	🚀 Cristiano Ronaldo & Matthew Vaughn launch ***UR • Marv***, a film studio blending sports and action cinema (UK).	🚀 Former WildBrain execs launch ***TeamFalco***, an IP studio for YouTube/Roblox-native content and brand engagement (UK).	🚀 **ADRENALINE Studios** opens in Lyon, boosting dubbing and sound services for animation and live-action projects.
🚀 Italy's ***Rainbow Group*** secures $92M from TEC Movie to grow animation IPs and accelerate global expansion.	🤝 DNEG's ***Brahma*** acquires ***Metaphysic*** to unite 800+ experts in AI video, image, and voice content creation	🚀 ***Mediawan*** acquires 51% of *See-Saw Films* (producers of *Slow Horses*, *The King's Speech*) to scale global premium content (UK-Australia).	🤝 ***VICE*** acquires *Cuba Pictures*, expanding its scripted slate post ITV & London Alley deals (USA, UK).	🤝 ***RedBird Capital*** to acquire *Telegraph Media Group* for $673M, with a focus on digital scaling and U.S. growth (UK, USA).	
	🤝 *Hungary's **NFI Studios*** expands with 4 new soundstages, fully booked for 2025 (Budapest).		🤝 ***Lipsie*** acquires *Digital Brain Studio* to scale multilingual AV translation and AI dubbing (France, USA).	🚀 ***Paper Owl*** opens 5,000-sq-ft Belfast studio to ramp up kids' productions like *Pablo* and *Nikhil & Jay* (UK).	
			🚀 ***MUBI*** raises $100M (Sequoia-led), hits $1B valuation, and commits to more originals like *The Mastermind* (UK).	🚀 ***Eastbrook Studios*** (London) launches with 12 soundstages & 1,200 jobs, backed by Hackman Capital Partners (UK).	
			🚀 *Samsung*, ***Twickenham Studios***, and *Quite Brilliant* team up to launch one of UK's largest virtual production stages.	🤝 ***BBC Studios*** takes a minority stake in *Samphire Films*, securing format rights & global distribution (UK).	

M&A, stake, investments

New launch, expansions

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Thank You

Have questions? Need help? Want to become a Vitrina member?

Drop a line to *Jacqueline Hart <jacqueline.hart@vitrina.ai>*