

COLOMBIA

(Pop: 47.70 million; GDP: \$712.5 billion)

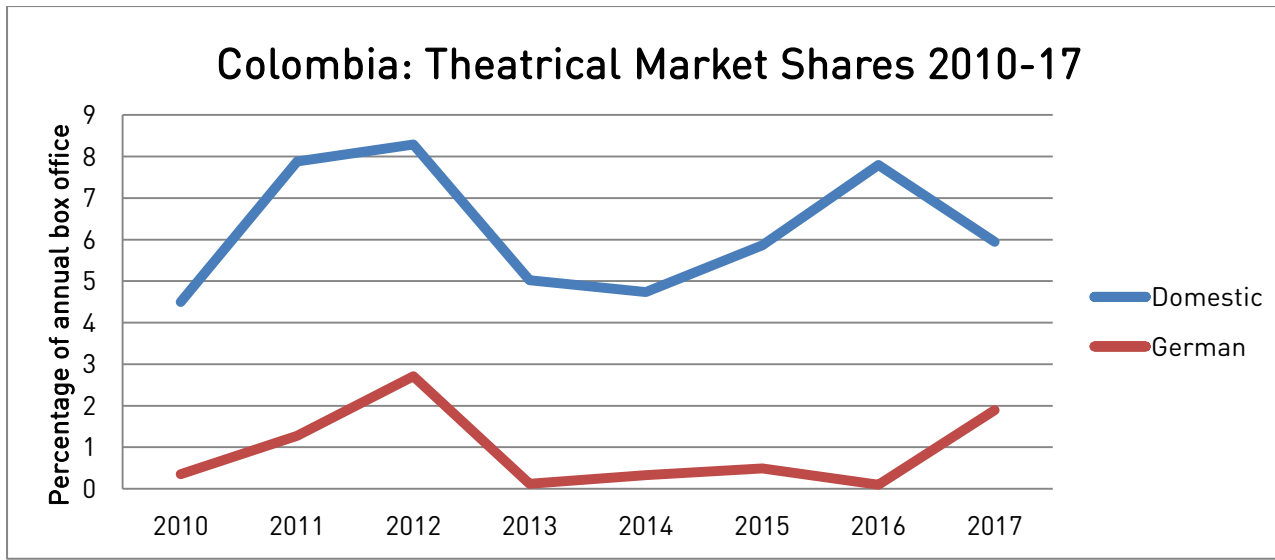
(1) COLOMBIA: THEATRICAL MARKET OVERVIEW, 2010-17

	2010	2011	2012	2013	2014	2015	2016	2017
Screens	588	643	704	790	870	935	1,008	1,082
Theatrical admissions (millions)	33.7	33.8	40.8	43.2	46.5	58.8	61.4	62.6
Per capita attendance	0.74	0.83	0.88	0.92	0.98	1.22	1.30	1.30
Box office (EUR millions*)	70.1	82.4	90.4	91.4	115.6	164.4	165.7	153.1
Average ticket price (EUR)	2.91	3.40	3.41	3.16	3.39	2.76	2.67	2.44
Releases	207	206	213	244	274	338	312	297
Domestic releases	10	18	23	17	28	36	41	41
US releases	157	116	136	156	141	126	140	119
European releases	31	16	23	29	25	19	21	74
German releases	6	4	3	1	3	4	4	6
Domestic market share	4.5%	7.88%	8.29%	5.02%	4.74%	5.86%	7.80%	5.95%
German market share	0.35%	1.28%	2.71%	0.12%	0.33%	0.49%	0.10%	1.89%

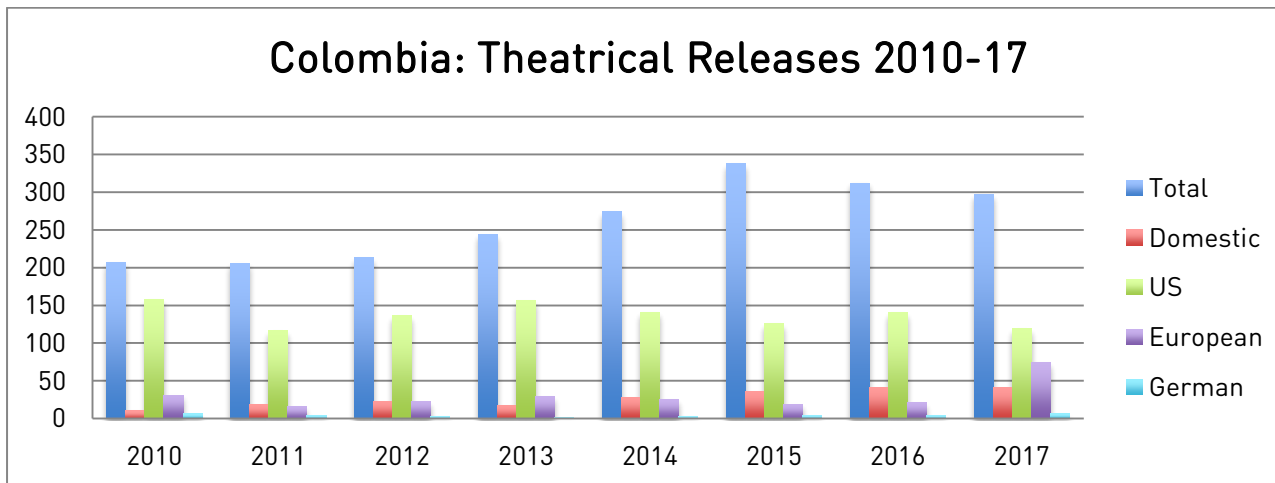
*EUR equivalents are calculated throughout at the exchange rate for December 31 of the year in question.

**Excluding German majority films

Colombia: Theatrical Market Shares 2010-17



Colombia: Theatrical Releases 2010-17



[2] COLOMBIA: THEATRICAL RELEASES OF GERMAN FILMS, 2010-17

Title	Distributor	Release date	Box Office US\$
2010 German films (100% or majority co-productions)			
DIE WELLE (Ger)	Cine Colombia	23.04.10	129,199
KIRSCHBLÜTEN – HANAMI (Ger)	Cine Colombia	09.07.10	123,621
WOLKE 9 (Ger)	Cine Colombia	30.07.10	52,628
DAS WEISSE BAND (Ger/Aut/It/Sp)	Babilla Ciné	05.03.10	34,799
DIE FRAU DES ANARCHISTEN (Ger/Sp/Fr)	Cineplex	26.03.10	28,707
PANDORUM (Ger/US)	Cineplex	21.05.10	13,164
2010 German minority co-productions			
RESIDENT EVIL: AFTERLIFE (UK/Ger/US)	Sony Pictures Colombia	10.09.10	3,124,133
MÄN SOM HATAR KVINNOR (Swe/Ger/Nor)	Cine Colombia	30.04.10	333,553
NINJA ASSASSIN (US/Ger)	Warner Bros. Colombia	29.01.10	146,524
THE CHILDREN OF HUANG SHI (Aus/Cn/Ger)	Cine Colombia	28.05.10	55,554
MONGOL (Kaz/Ger/Rus/Mon)	Cine Colombia	09.04.10	54,576
SÉRAPHINE (Fr/Bel/Ger)	Cineplex	30.04.10	37,309
FLAMMEN & CITRONEN (Den/Cz/Ger)	Cineplex	01.01.10	24,732
TRADE - WILLKOMMEN IN AMERIKA (US/Ger)	Cine Colombia	26.11.10	9,187
GIGANTE (Uru/Arg/Ger/NL)	Cine Colombia	19.03.10	3,420
2011 German films (100% or majority co-productions)			
THE THREE MUSKETEERS (Ger/Fr/UK/US)	Cine Colombia	21.10.11	1,414,817
SOUL KITCHEN (Ger/Fr/It)	Babilla Ciné	15.04.11	103,441

DIE FREMDE (Ger)	Cineplex	11.11.11	52,870
DIE PÄPSTIN (Ger/It/Sp)	Cine Colombia	26.08.11	30,626

2011 German minority co-productions

UNKNOWN (US/Ger/UK/Fr)	Warner Bros. Colombia	25.02.11	223,071
THE WORLD IS BIG AND SALVATION LURKS AROUND THE CORNER (Bul/Ger/Slvn)	Cine Colombia	03.06.11	57,214
CARLOS (Fr/Ger)	Cineplex	10.06.11	51,923
AJAMI (Isr/Ger/UK)	Cine Colombia	15.04.11	47,560
THE HUMAN RESOURCES MANAGER (Isr/Ger/Fr)	Cine Colombia	12.08.11	29,584

2012 German films (100% or majority co-productions)

RESIDENT EVIL: RETRIBUTION (Ger/Can)	Sony Pictures Colombia	14.09.12	3,548,203
A DANGEROUS METHOD (Ger/Can/UK/Swz)	Cineplex	22.06.12	156,098
PINA (Ger)	Cine Colombia	09.03.12	80,813

2012 German minority co-productions

THE VOW (US/Brz/Fr/Aus/UK/Ger)	Sony Pictures Colombia	04.05.12	288,137
THE WHISTLEBLOWER (US/Can/Ger)	Venus Films	09.03.12	91,995
TINKER TAILOR SOLDIER SPY (UK/Fr/Ger)	Cine Colombia	20.04.12	77,619
MELANCHOLIA (Den/Swe/Fr/Ger)	Babilla Ciné	30.03.12	76,601
LE HAVRE (Fin/Fr/Ger)	Babilla Ciné	29.06.12	59,521
FLYPAPER (US/Ger)	Cine Colombia	14.12.12	57,545
BLACK BUTTERFLIES (NL/Ger/SA)	Babilla Ciné	10.12.12	46,175
PERFECT SENSE (US/Ger/Swe/Den)	n/a	31.08.12	26,886
HYSTERIA (UK/Fr/Ger/Lux)	n/a	31.08.12	n/a

2013 German films (100% or majority co-productions)

CLOUD ATLAS (Ger/US)	Warner Bros. Colombia	01.03.13	182,649
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2013 German minority co-productions

HANSEL & GRETEL: WITCH HUNTERS (US/Ger)	UIP Colombia	25.01.13	5,726,255
THE MORTAL INSTRUMENTS: CITY OF BONES (US/Ger)	Cine Colombia	30.08.13	715,686
AMOUR (Fr/Ger/Aut)	Babilla Ciné	01.03.13	252,500
RUSH (US/UK/Ger)	Cine Colombia	18.10.13	181,486
ET SI ON VIVAIT TOUS ENSEMBLE? (Fr/Ger)	Cineplex	07.06.13	174,468
DEN SKALDEDE FRISØR (Den/Swe/It/Fr/Ger)	Babilla Ciné	14.06.13	144,294
EN KONGELIG AFFÆRE (Den/Cz/Swe/Ger)	Cineplex	22.03.13	112,770
WADJDA (Saudi/Ger)	Cineplex	13.12.13	99,782
HOLY MOTORS (Fr/Ger)	Babilla Ciné	22.11.13	27,764

2014 German films (100% or majority co-productions)

TARZAN 3D (Ger)	Cine Colombia	16.05.14	394,942
MR. MORGAN'S LAST LOVE (Ger/Bel/Fr/US)	Cine Colombia	21.08.14	98,048
ZWEI LEBEN (Ger/Nor)	Cineplex	31.07.14	49,647

2014 German minority co-productions

POMPEII (Can/Ger)	n/a	25.04.14	590,076
THE BOOK THIEF (US/Ger)	20th Century Fox Colombia	07.03.14	523,176
THE GRAND BUDAPEST HOTEL (US/Ger)	20th Century Fox Colombia	18.07.14	409,370
THE MONUMENTS MEN (US/Ger)	20th Century Fox Colombia	21.02.14	285,640
NYMPHOMANIAC: VOLUME 1 (Den/Ger/Fr/Swe/Bel)	Cineplex	28.02.14	251,618

THE LUNCHBOX (Ind/Fr/Ger)	Babilla Ciné	14.08.14	116,840
LA RELIGIEUSE (Fr/Ger/Bel)	Cine Colombia	06.06.14	82,691
WAKOLDA (Arg/Sp/Ger/Fr)	Cine Colombia	02.05.14	71,551
NYMPHOMANIAC: VOLUME 2 (Den/Ger/Fr/Swe/Bel)	Cineplex	25.04.14	68,389
A MOST WANTED MAN (UK/US/Ger)	n/a	06.11.14	66,602
GUTEN TAG, RÁMON (Mex/Ger)	20th Century Fox Colombia	06.11.14	50,716

2015 German films (100% or majority productions)

DIE BIENE MAJA - DER KINOFILM (Ger/Aus)	UIP Colombia	13.08.15	212,966
IM LABYRINTH DES SCHWEIGENS (Ger)	Cine Colombia	10.12.15	62,245
WHO AM I - KEIN SYSTEM IST SICHER (Ger)	Cineplex	24.09.15	28,616
OOOPS! DIE ARCHE IST WEG (Ger/Ire/Bel/Lux)	Cine Colombia	06.08.15	10,205

2015 German minority co-productions

HITMAN: AGENT 47 (US/Ger)	20th Century Fox Colombia	27.08.15	954,207
THIRD PERSON (US/UK/Ger/Bel)	Cine Colombia	28.05.15	113,773
BRIDGE OF SPIES (US/Ger)	20th Century Fox Colombia	22.10.15	109,609
SHE'S FUNNY THAT WAY (US/Ger)	Cine Colombia	03.09.15	46,511
KIS UYKUSU (Tur/Ger/Fr)	Cine Colombia	20.08.15	24,506

2016 German films (100% or majority co-productions)

ELSER - ER HÄTTE DIE WELT VERÄNDERT (Ger)	Cine Colombia	17.03.16	76,169
PHOENIX (Ger)	Cine Colombia	14.04.16	58,761
24 WOCHEN (Ger)	Cineplex	27.10.16	14,136
HEIDI (Swz/Ger)	Babilla Ciné	01.12.16	10,488

2016 German minority co-productions

POINT BREAK (US/Ger)	Warner Bros. Colombia	07.01.16	1,782,011
EDDIE THE EAGLE (UK/US/Ger)	20th Century Fox Colombia	31.03.16	177,563
THE DANISH GIRL (UK/Bel/Ger/US)	UIP Colombia	18.02.16	135,492
SNOWDEN (US/Fr/Ger)	Walt Disney Colombia	08.12.16	51,196
A HOLOGRAM FOR THE KING (US/Ger)	Cineplex	10.11.16	42,628
RACE (Fr/Ger/Can)	Diamond Films	04.08.16	36,490
EL OLIVO (Sp/Ger)	n/a	28.07.16	25,655

2017 German films (100% or majority co-productions)

RESIDENT EVIL: THE FINAL CHAPTER (Ger/Aus/Can)	Sony Pictures Colombia	26.01.17	2,044,008
HAPPY FAMILY (Ger/UK)	Cine Colombia	07.09.17	526,870
RICHARD DER STORCH (Ger/Bel/Lux/Nor)	Cine Colombia	04.05.17	507,796
NEBEL IM AUGUST (Ger/Aut)	Cine Colombia	06.04.17	277,183
PAULA - MEIN LEBEN SOLL EIN FEST SEIN (Ger/Fr)	Cine Colombia	25.05.17	62,401
TONI ERDMANN (Ger/Aut/Rom)	Sony Pictures Colombia	09.02.17	16,803

2017 German minority co-productions

A CURE FOR WELLNESS (US/Ger)	20th Century Fox Colombia	16.02.17	198,965
COLLIDE (UK/US/Ger)	Diamond Films	13.07.17	161,686
FRANTZ (Fr/Ger)	Cine Colombia	04.05.17	50,034
PARADIES (Rus/Ger)	Cineplex	12.05.17	8,617
ANGRY INDIAN GODESSES (Ind/Ger)	Babilla Ciné	21.12.17	6,072
POR SIEMPRE (Brz/Aut/Col/Ger/NL)	CanZion Films	11.05.17	2,411

(3) COLOMBIA: TOP 10 GERMAN FILMS (THEATRICAL), 2010-17

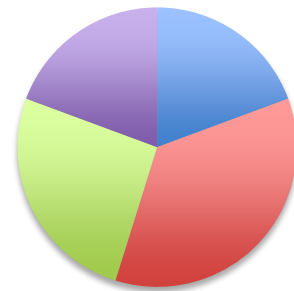
	Admissions	Box office (EUR)
RESIDENT EVIL: RETRIBUTION (2012)	788,279	2,688,033
RESIDENT EVIL: THE FINAL CHAPTER (2017)	703,956	2,044,008
THE THREE MUSKETEERS (2011)	320,094	1,088,321
HAPPY FAMILY (2017)	181,454	526,870
RICHARD DER STORCH (2017)	174,885	507,796
TARZAN 3D (2014)	96,136	325,902
NEBEL IM AUGUST (2017)	95,462	277,183
DIE BIENE MAJA - DER KINOFILM (2015)	70,791	195,382
CLOUD ATLAS (2013)	41,884	132,354
A DANGEROUS METHOD (2012)	34,709	118,356

(4) COLOMBIA: DISTRIBUTORS OF GERMAN FILMS, 2010-17

	2010	2011	2012	2013	2014	2015	2016	2017	Total
Cine Colombia	3	2	1	-	2	2	2	4	16
Cineplex	2	1	1	-	1	1	1	-	7
Babilla Ciné	1	1	-	-	-	-	1	-	3
Sony Pictures Colombia	-	-	1	-	-	-	-	2	3
UIP Colombia	-	-	-	-	-	1	-	-	1
Warner Bros. Colombia	-	-	-	1	-	-	-	-	1

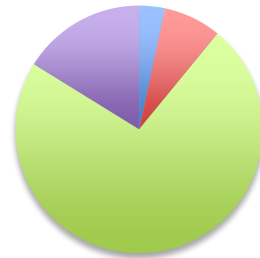
[5] COLOMBIA: GERMAN FILMS BY GENRE, 2010-17

Colombia: German Releases by Genre, 2010-17



- Arthouse
- German Stories
- English Language
- Animation & Children's Films
- Local Interest

Colombia: German Films Box Office by Genre, 2010-17



- Arthouse
- German Stories
- English Language
- Animation & Children's Films
- Local Interest

(6) GERMAN FILMS IN COLUMBIA, 2010-17: AN ANALYSIS

With a population slightly larger than that of Argentina or Spain, Colombia is the fourth largest continental South American country by land area, but it is a minor market for European films in general and German films in particular. An average of less than four were released there between 2010 and 2017, with even that meagre number boosted by the figures for 2010 and 2017, in each of which six titles were released. Indeed, 2017 was an unusually strong year for 100% German films and majority co-productions, with a market share of almost 2% (the average for the period surveyed is 0.9%), thanks to the allegedly final episode in the RESIDENT EVIL saga plus two animated films: HAPPY FAMILY and RICHARD DER STORCH.

The market as a whole, like the country itself, is economically relatively stable and prosperous and the cinema infrastructure has undergone considerable development in the past decade. The number of screens has risen by 84% since 2012; admissions are up 86%; per-capita attendance by 76%; and, above all, box office revenues rose from EUR 70 million in 2010 to EUR 165.7 million in 2016 - a hike of 136%. although 2017 saw a reduction in revenue of EUR12.6 million. The only thing to have stayed more or less the same is the average ticket price, although refractions through the exchange rates between the Colombian peso, the US dollar and the Euro may cause distortions here.

With local fare consistently nabbing a market share of less than 10% (the average for the period in question is 6.25%), despite an active government film promotion body, Prolmagenes, the market is dominated - as in most Latin American countries - by US titles, and there are no real arthouse distributors. Local major Cine Colombia, founded in 1927, which is both a distributor and an exhibitor, has a 50% market share and released 16 of the 36 German films which have opened in the country since 2010.

The charts above which break German releases down by genre are among the most extreme in the entire report in terms of the discrepancy between the number of German stories - films made in German which are not designed for the arthouse sector - which account for 31% of the number of German films released but just 8% of the box office. Arthouse fares even worse, accounting for 17% of the films released against 3% of the box office

What works in Columbia? American films - not just the usual international blockbusters but also horror thrillers, for which Colombian audiences seem to have a special taste. Animated films, with RICHARD DER STORCH one of only five films to take over half a million dollars at the box office (the others were THE THREE MUSKETEERS and two German-produced RESIDENT EVIL episodes).

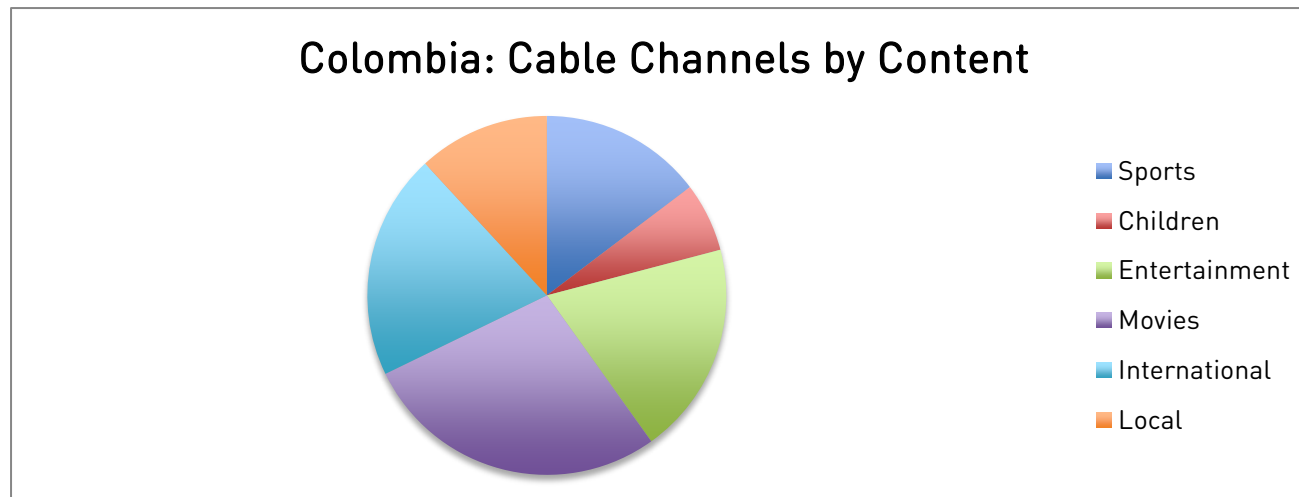
What doesn't work in Colombia? Arthouse: only one arthouse release, SOUL KITCHEN, took over \$100,000 at the box office and only six were released over the eight years surveyed.

What else might appeal? Horror is not a major strand in German independent production, but what there is might be packaged for the Colombian market

[7] GERMAN FILMS IN COLOMBIA, 2010-17: TV AND VOD

Colombia has lived through an era in which technology has outpaced infrastructure: HD broadcasts, for instance, became available in 2003, but it was a decade before any HD content was actually transmitted to viewers. Now, there are 76 HD channels on the DirecTV platform.

That provider is one of the oldest pay-TV outlets in South America (it launched in the US in the early 1980s), and its non-HD channels shown in the chart below are pretty much the standard issue for any developed Latin American country. In that respect, Colombia sits in the middle of the spectrum economically, but boasts the continent's highest digital take-up rate. 175 or so channels of local and international pay-TV are available, with movies the largest category.



Owned and operated from 'El Norte' (the US), Colombia's film channels are programmed on a pan-American basis, with only those ones created as a platform for local movies showing anything other than American movies with any frequency, as indicated by the charts on the following page. In terms of content, Space TV shows mainly action/adventure and horror movies. Two German titles were programmed: COLONIA DIGNIDAD - ES GIBT KEIN ZURÜCK - which is set in Chile - and NIGHT TRAIN TO LISBON.

Colombia: Films on Space TV by Country of Origin



For details of on-line VOD platforms available in Colombia, see the appropriate appendix.

(8) COLOMBIA: SOURCES AND ACKNOWLEDGMENTS

CIA World Factbook, XE Currency Converter, European Audiovisual Observatory, Rentrak, Proimágenes Colombia, comScore, eMarketer, Departamento Administrativo Nacional de Estadística (DANE), Comisión Nacional de Televisión, Dataxis, Next TV LATAM, Videomind. mi-tv.