

CMPA International Strategy

Framework & Target Markets: 2025-2028





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About the Canadian Media Producers Association..... 3

About the Canadian industry 3

Canadian screen content in the international market..... 3

The CMPA’s objectives in the international market 4

Overview and guiding principles..... 4

 Co-production 5

 Provide market intelligence 5

 Training..... 5

 International sales/export opportunities 5

 International networking opportunities..... 5

 Enhance visibility 5

Activities and timelines..... 6

 Event-related international activities..... 6

 Ongoing support activities..... 6

Target Markets..... 6

APPENDIX..... 19



About the Canadian Media Producers Association

The Canadian Media Producers Association is the national advocacy organization for independent producers, representing hundreds of companies engaged in the development, production and distribution of English-language content made for television, cinema and digital media channels. We work to promote the continued success of the Canadian production sector and to ensure a bright future for the diverse content made by our members for both domestic and international audiences.

About the Canadian industry

The Canadian screen-content industry is a robust sector that generates significant economic activity - in 2023/24, the Canadian media production industry reached CAD 9.58 billion in the total volume of film and television production¹. The foreign investment in the export of Canadian content through presales and distribution advances totaled CAD 857 million last year.² In the same period, Canada's production industry generated 179,130 full-time jobs and CAD 11.04 billion in GDP for the Canadian economy.³

Canadian screen content in the international market

To thrive in today's global marketplace, Canadian content needs to travel across our borders and onto international screens. Canadian production companies have been successful at forging an international reputation for delivering a level of unparalleled production expertise and service. Canada has international co-production treaty agreements and memorandums of understanding with over 60 countries, with new treaties being negotiated continually.

Canada makes an excellent co-production partner, thanks to the following attributes of our country and our industry:

- Variety of financing sources, including federal and provincial tax credits
- Physical and cultural proximity to the United States
- Excellent location services and diverse locations/landscapes
- High-standard, full-service production and post-production facilities
- Experienced and highly skilled production crews and talent

Co-productions continue to be critical to ensure the vitality of the screen-content sector in Canada. These productions are important vehicles to strengthen international ties in the audiovisual sector and a way to promote and market Canadian talent abroad. They also enhance each partnering country's production capacity by drawing foreign investment and by

¹ CMPA (2024), *PROFILE: Economic Report on the Screen-Based Media Production Industry in Canada*

² Ibid.

³ Ibid.

facilitating project financing for works that might not otherwise be produced, thereby boosting production budgets, generating employment and developing local talent.

In the last 10 years, Canada's screen content producers partnered in more than 700 international co-productions with budgets totaling almost \$6 billion. The UK and France continue to be Canada's main co-production partners, with Australia, Ireland and Germany rounding out the list of main partners.

The CMPA will focus on providing opportunities to members in key markets but will also create initiatives that will assist Canadian producers in succeeding in emerging markets.

The CMPA's objectives in the international market

The CMPA's objectives center around five main areas:

1. Increase co-development and co-production opportunities
2. Increase international sales/export opportunities
3. Increase foreign investment in Canadian companies
4. Facilitate international networking opportunities
5. Enhance the visibility of CMPA members internationally

Overview and guiding principles

Each of the above objectives will be achieved through a number of initiatives carried out throughout the year, giving access to member companies from across the country of all sizes, working in all genres and creating for all platforms.

The strategy will provide a framework based on activities and events taking place over each fiscal year and will be inclusive of all markets, with a special focus on markets that are of most interest to our members, those being the UK, France, USA, Ireland, and Germany.

The CMPA will also provide opportunities to explore markets Canadian companies haven't traditionally worked with. We will start this process by building partnerships with powerhouses such as India, Nigeria and South Africa, among others. When engaging with non-European markets, the CMPA will work towards an approach that is inclusive, and based on equitable skills exchange, mentorship, and training.

In all our international activities whether it be trade missions we undertake abroad or hosting foreign delegations, we will work towards equitable representation from all communities within the CMPA membership. We will also work with our partners to ensure that they similarly work towards identifying and including their BIPOC stories and producers, creating space to present them to Canadian producers for potential co-venture/co-production opportunities.

In addition to market-specific activities, the CMPA will be organizing general support activities that will provide market intelligence and help companies to compete in the global market through training and development.

The strategy can be broken down into six main areas of focus, as outlined below:

Co-production

- Organize virtual and physical trade missions to help members explore markets of interest and familiarize themselves with incentives and opportunities, connect with potential partners
- Advise government on negotiating new treaties and renegotiating existing ones based on the evolving needs of the market
- Create and enhance existing online tools that facilitate matchmaking and collaboration
- Organize pitching opportunities

Provide market intelligence

- Develop tools utilizing existing market intelligence (the CMPA's export studies, market reports from the Trade Commissioner Service, etc.) to help members identify the types of content that travel and the markets that are looking for the types of content they create

Training

- Provide online courses and masterclasses that will help members enhance their market potential and reach

International sales/export opportunities

- Build partnerships with foreign partners that will allow CMPA members to access decision-makers
- Assist members with developing export strategies

International networking opportunities

- Organize B2B meetings, information sessions and networking receptions at international events in both Canada and abroad
- Connect with visiting delegations in Canada

Enhance visibility

- Leverage partnerships to showcase members works at international events and international publications
- Provide a platform to members to showcase their projects

Activities and timelines

Event-related international activities

Please see a brief description of intended activities under Target Markets.

Ongoing support activities

Ongoing support activities will center around providing training, market intelligence, enhanced online resources, tools to showcase members' work and to facilitate networking.

The following activities are a collection of initiatives that the CMPA could undertake in every fiscal year, with slight variations and focus, providing bespoke opportunities CMPA members in every fiscal year.

Workshops and masterclasses

The CMPA will work with experts internationally to create a series of online workshops and masterclasses. Potential topics will include:

- Finding the right online platform for your content
- Working with... series: international broadcasters/buyers
- Unexplored markets series: learning about up and coming markets and how to interact in a decolonial fashion (Nigeria, Colombia, etc.)
- How to build a website for your production company to showcase your work internationally

Networking opportunities

The CMPA will work with its counterparts internationally to identify opportunities to create networking events at events internationally and in Canada. The events can include mixers and B2B meetings at physical events, online networking opportunities

Target Markets

The CMPA's International Committee identified the need to survey members to get a clearer picture of trends, opportunities, and challenges in today's international marketplace. The survey's goal was both to get a better understanding of current market realities to help provide meaningful input in policy discussions and to assist members more effectively in their efforts to expand their businesses globally.

The survey was also designed to measure the engagement in various regions and markets internationally and obtain feedback on already existing export development initiatives.

This survey was conducted in spring of 2024, and it informed the target markets identified in this strategy.

For the next three years our main focus will be on the following markets:

Country	Market status
Australia	Established
France	Established
Germany	Established
Ireland	Established
Mexico	Emerging
Nigeria	Emerging
South Africa	Emerging
United Kingdom	Established
United States of America	Established

Our strategy is built on further strengthening existing relationships and creating opportunities for members to work with partners we have a tradition of collaborating with and also with emerging markets where opportunities present themselves.

The CMPA may host and/or attend exploratory meetings at major international events to gauge mutual interest in co-production and other business opportunities with each of the markets outlined below.

Australia

The shared language and the similar regulatory and policy environment and audiovisual support system and structural landscape makes Australia a natural partner for Canada. The Canada – Australia co-production treaty has been in the top five most used treaties in the last 10 years, with 25 projects with the global budget of \$123 million.

The CMPA has a close working relationship with its sister organization Screen Producers Australia (SPA) and have a history of collaboration over two CMPA missions to Screen Forever, a SPA mission to Prime Time in Ottawa and other activities at international festivals and markets, most recently at Content London 2024 where 50 Canadian and Australian producers and industry professionals gathered at a dinner to exchange ideas and explore co-production opportunities.

INTENDED ACTIONS - AUSTRALIA

Relationship building: The CMPA will continue to work with Screen Producers Australia to identify opportunities for collaboration at virtual and in-person events in Canada, Australia and internationally where Australian partners are present.

Outbound mission: organize a delegation to Screen Forever in May 2025. The goal of the delegation to Screen Forever and Canada Connect is to increase co-production and co-

development opportunities between Canadian, Australian and other international production partners, to increase sales and export opportunities for participating producers and facilitate international networking opportunities and showcase Canadian companies.

France

France is internationally recognized as a trailblazer in the film and television industry, and is not only the coproducing partner of choice for Canadian films, but it is also key trading partners for Canadian television and film and is in the top five markets for Canadian television exports.⁴

The country commands an established support structure through favourable tax and financial incentives and is a major catalyst for access to European, Latin American, and Asian markets.

State and regulatory bodies such as the Centre national du cinéma et de l'image animée (CNC) and Sociétés de financement de l'industrie cinématographique et de l'audiovisuel (SOFICA) play indispensable roles in France's distinguished industry. The State upholds that a robust film and television industry is a cultural priority and provides strategic support to finance, distribute, promote, and export content. For nearly 70 years, Unifrance (administered by the CNC) has been a world-leader in providing support in selling French films in major international markets.

Canada and France have a long-standing, fruitful partnership celebrating 129 audiovisual treaty co-production projects between 2014-15 and 2023-24.⁵ The total combined budgets of these co-productions amounted to CAD \$920 million.⁶ France is the most important country to Canada for exporting feature films of all genres, and most especially animation productions. France continues to be Europe's biggest market for non-Hollywood films, with between two and two-and-a-half times the number of European [including French] films opening there than studio pictures.⁷

Key events in the France of import to the Canadian screen-content industry include the *Anney International Animation Film Festival*, *MIPCOM*, *Cannes Film Festival*, *Series Mania* and *Sunny Side of the Doc*:

- France is a top European exporter of animation and continues to be catalyst for animation productions particularly through the *Anney International Animation Film Festival*, which holds a competition between cartoon films and

⁴ Communications MDR: Exporting Canadian Screen-based Productions in a Global Market: Trends, Opportunities and Future Directions (2020)

⁵ CMPA (2024) *PROFILE: Economic Report on the Screen-Based Media Production Industry in Canada*.

⁶ Ibid.

⁷ Market Study France 2010-2017, published May 2018, by Split Screen for German Films https://www.german-films.de/fileadmin/mediapool/pdf/Marktanalyse/2018/France_2010-2017_MAI_2018_edit.pdf

various techniques such as animated drawings, cut-out papers, and modeling clay.

- The *Cannes Film Festival* has been described as the most important film festival with respect to worldwide impact and garnered media attention. *Cannes* was founded with the purpose of raising the profile of films to develop cinema, boost the film industry, and celebrate ingenuity on a global scale. Cannes revels in celebrating the best filmmakers and emerging talent from all over the world, making attendance at the Festival key for creative entrepreneurs' global market strategies.
- *Series Mania International Festival* in Lilles, is an event that is becoming a frequented event amongst Canadian television producers. *Series Mania Forum*, the industry event accompanying the festival, is the meeting place for international players in the episodic television creation. Since 2018, Lille Transatlantic Dialogues is also the new forum for high-level meetings and exchanges dedicated to bringing together the main political, institutional, creative and economic players in TV and cultural sectors in Europe and the United States.
- Sunny Side of the Doc is a major international marketplace for documentary and specialist factual content across all platforms. Each year, the 4-day event brings together broadcasters, decision makers, financing bodies, distributors, content creators and producers from around the world to sell or buy projects and programmes, and to find coproduction partners from 50 countries.

The CMPA intends to partner on the following activities in France with members of the International Business Development Group, lead by Telefilm Canada.

- Marche du Film during the Cannes International Film Festival
- International Animation Film Market (MIFA) at the Annecy International Animation Film Festival.

The goal of the partnership is to create enhanced visibility for Canadian participants, networking opportunities and a chance to showcase Canadian content.



INTENDED ACTIONS - FRANCE

Relationship building: Support members through our partnership with Telefilm at the events mentioned above. In addition, the CMPA will work with industry partners to identify opportunities for collaboration at virtual and in-person events in Canada, France and internationally where French partners are present.

Outbound mission: organize a delegation to Series Mania in March 2025

Inbound mission: Work with USPA to bring in a delegation of French producers for Prime Time 2025.

Ireland

Ireland's film and television industry offers a highly developed infrastructure, backed by stable Irish government support. The audiovisual content production sector in Ireland is estimated to be worth €692 million⁸.

The Fís Éireann/Screen Ireland is the market's main funding body. Its figures for the industry show that in 2019 Irish films, television and animation productions produced in Ireland had combined budgets of over €760 million and spent over €357 million on local employment and local goods and services. This 2019 figure represents an annual increase of 162% on 2018 spend and an increase of 256% since 2007⁹.

Ireland has co-produced with almost every European territory, as well as Canada, Australia and South Africa, and has a wealth of experienced co-producers across all media platforms. Section 481, the Irish tax incentive for TV and film, was recently extended to 2020. This incentive was increased on January 1, 2015 from 28% to 32% of a film's Irish spend, precipitating a system change from investor-led funding to a tax credit and garnering expanded interest from Canadian producers to co-produce with Irish partners.

INTENDED ACTIONS - IRELAND

Relationship building: Work with Screen Producers Ireland to identify opportunities for collaboration at virtual and in-person events in Canada, Ireland and internationally where Irish partners are present.

⁸ A Report from Olsberg SPI with Nordicity: Economic Analysis of the Audiovisual Sector in the Republic of Ireland (2017)

⁹ <https://www.screenireland.ie/about/research-data>

Inbound mission: Work with Screen Producers Ireland to bring in a delegation of Irish producers for Prime Time 2025.

Germany

The country's market size (population 82.7 million in 2016), economic and political stability and very highly accommodating business environment make it a very attractive country for exporters. EDC position is open and is actively pursuing business in the country. Risk rating is very low.¹⁰

By 2022, the total cinema revenue is predicated to reach USD \$1.4 billion, up at a 1.2% CAGR from 2017.¹¹ After falling in 2016, box office revenue in 2017 increased by 3.2% to USD \$1.2 billion.¹² Germany's strong regional film funds and cash-rebate incentives along with experienced, multilingual crews and impressive landscapes repeatedly draw international productions.¹³ The TV market in Germany is mature and is expected to surpass the UK as Western Europe's leading TV subscription industry.¹⁴ In 2017, TV revenue reached USD \$5.8 billion and is forecasted to reach USD \$6.5 billion by 2022. Germany's license-fee income is the second-highest in world, accounting for 45.4% of total traditional TV market income.¹⁵

Germany has one of the most developed OTT video markets in the world. There are over 60 OTT services operating in German making this country the second largest OTT video market in Europe.¹⁶ In terms of revenue, Germany has the sixth largest OTT video market worldwide, and is expected to grow as broadband infrastructure further improves.¹⁷

The Canada – Germany co-production treaty has been the third most used one between 2010- and 2017.¹⁸ After the US, the most lucrative territories for international sales of Canadian screen-based content are in Europe. The most important of these are the larger TV markets include Germany as one of the three top countries.¹⁹

Key events in Germany for the Canadian screen-content industry include the *Berlin International Film Festival (Berlinale)*:

- Held in one of the most vibrant cities in the world and with 500,000 admissions and 20,000 professions attending each year, *Berlinale* has the largest public

¹⁰ <https://www.edc.ca/en/country-info/country/germany.html>

¹¹ <https://www.pwcmediaoutlook.com/country/GERMANY>

¹² Ibid.

¹³ World of Locations, Malta Film Commission, November 2017-April 2018, Print.

¹⁴ Ibid.

¹⁵ Ibid.

¹⁶ Ibid.

¹⁷ Ibid.

¹⁸ Communications MDR: Exporting Canadian Television Globally – Trends, Opportunities and Future Directions. May 2017.

¹⁹ Communications MDR: Exporting Canadian Screen-based Productions in a Global Market: Trends, Opportunities and Future Directions (2020)

attendance of any annual film festival.²⁰ Its *European Film Market (EFM)* has been described as “an international marketplace, a compass for the new film year and a platform for innovation and change.”²¹ Over 4200 journalists produce media coverage in over 110 countries during the *Berlinale* and *EFM*.²² Germany, and in particular the *Berlinale* and *EFM*, are critical to the prosperity and innovation of the international film market.

INTENDED ACTIONS - GERMANY

Inbound mission: Work with industry partners to bring in a delegation of German producers for Prime Time 2026.

Mexico

Mexico, a leader in Latin American and Spanish-language audiovisual production, has seen a notable increase in global content market share. Its appeal lies in its talented and skilled workforce, cost-effective production environment, and a rich cultural tapestry that has produced award-winning films and series over the past decades. With recent expansions in local streaming services, Mexico has positioned itself as a key player in the content landscape.²³

In 2022, the audiovisual’s direct economic impact amounted to a MXN\$138.7 billion contribution to domestic GDP and over 77,000 jobs. The audiovisual sector directly creates more GDP in Mexico than that generated by the manufacturing of computers.

A significant multiplier effect is associated with the activity of the audiovisual industry in Mexico. In 2022, for every MXN\$10 million of value created directly by entities within the audiovisual industry, there was an additional economic contribution to Mexico’s GDP worth MXN\$6.5 million, implying a GDP multiplier of 1.6. Similarly, for every individual directly working within Mexico’s audiovisual industry, the industry’s activities and expenditure additionally supported 1.6 workers across the rest of the domestic economy, implying an employment multiplier of 2.6.²⁴

²⁰ https://www.berlinale.de/en/das_festival/festivalprofil/profil_der_berlinale/index.html

²¹ Ibid.

²² Ibid.

²³ Navigating the Mexican Audiovisual Ecosystem: Pathways for Canada. Market study October, 2024. Prepared by Boomful for the Embassy of Canada in Mexico

²⁴ Consulting Report 16 Apr 2024 The Economic Contribution of Mexico’s Audiovisual Industry. Oxford Economics. <https://www.oxfordeconomics.com/resource/the-economic-contribution-of-mexicos-audiovisual-industry/>



Canada's audiovisual environment aligns well with Mexico's market needs and opportunities for co-production.

INTENDED ACTIONS - MEXICO

Relationship building: Work with industry partners to identify opportunities for collaboration at virtual and in-person events in Canada, Mexico and internationally where Mexican partners are present.

Virtual mission: Organize Virtual Business Development Day in 2025 in partnership with the Trade Commissioner Service.

Inbound mission: Work with the Trade Commissioner Service in Mexico to bring in a delegation of Mexico producers for Prime Time 2025.

Nigeria

Nigeria is Africa's most populous country, and one of the continent's largest economies. Its primary source of income is oil but due to the financial crisis of 2008-09, followed by the drop in the price of oil, its economic growth has been diversified²⁵ to include the entertainment industry.

Canada does not have a co-production treaty with Nigeria; however, exploring collaboration opportunities with this rapidly growing and maturing market would be advantageous from a financial and creative perspective. The country's film industry is second largest in the world, only surpassed by India's Bollywood, generating US \$7 billion, employing 1 million people and producing over 2,500 movies per year. Box office revenue is forecast to keep on rising, increasing at a CAGR of 8.0% over the forecast period from US \$79 million in 2016 to US \$116 million in 2021.²⁶ According to journalist Emily Witt, author of *Nollywood: The Making of a Film Empire*, Nigeria is positioned to become a "global brand much like the films of Bollywood or Kung Fu movies."²⁷

While most movies are generally low budget and are backed by private investors, Nigeria's creative industries enjoy government support in the form of initiatives to reduce financial

²⁵ CIA World Factbook (<https://www.cia.gov/library/publications/the-world-factbook/geos/ni.html>)

²⁶ PWC (2017) *Global Media and Entertainment Outlook 2017-2020* (<https://www.pwc.com/outlook>)

²⁷ PBS News Hour: *Inside Nollywood, the booming film industry that makes 1,500 movies a year.* (<https://www.pbs.org/newshour/arts/inside-nollywood-the-booming-film-industry-that-makes-1500-movies-a-year>)



burdens on new investments, and encourage both foreign and local investments into the film industry. The government also lends support to the industry in fighting piracy.²⁸ With their increased presence at MIPCOM and AFM, Nigeria is working on strengthening its relationships with Europe and North America.²⁹

Key events in Nigeria for the Canadian screen-content industry include the *Africa International Film Festival (AFRIFF)*:

- *AFRIFF* celebrates African Cinema and the positive socio-economic impact that a budding film industry can have for third world and developing economies. *AFRIFF* is Nigeria's prime event for encouraging international screen-content partnerships.

INTENDED ACTION

Relationship building: The CPGA will continue to work with the Pan African Chamber of Commerce to pursue opportunities within the market.

South Africa

South Africa has a bustling film industry and has been forecasted as a market to watch by PWC in the firm's 2017-2021 *Global Media and Entertainment Outlook* report. In 2016, South Africa reached a century high record with the release of 28 domestic productions, six more than the previous year.³⁰ Growth in production volume has been largely attributed to the weak rand, scenic shooting locations and favourable weather conditions, a sophisticated workforce and a competitive rebate system.³¹

South Africa's industry has grown over 85% in the last 5 years and is now one of the top locations for film, television and commercials. Their industry is expected to continue to grow, with revenue estimated to rise to US \$239 million by 2021.

Two additional alluring features of South Africa's screen-based industry are their incentives to grow the film industry, and state-of-the-art infrastructures to support production activity.

²⁸ The Guardian: *Nigeria: FG's Support for Creative Industry Paying Off, Says Mohammed.* (<http://allafrica.com/stories/201712130538.html>)

²⁹ Variety. *AFM: Nigerian Film Industry Looks to Work With Hollywood Partners.* <http://variety.com/2017/film/spotlight/afm-nigerian-film-industry-looks-to-work-with-hollywood-partners-1202606939/>

³⁰ European Audiovisual Observatory (2017). *FOCUS 2017 – World Film Market Trends.*

³¹ CMF Trends (2017). *Your Market Is Everywhere – South Africa.*

Canadian content fares well in South Africa and Canadian producers claim that the Canada-South Africa co-productions are among the “easiest to set up”.³²

With consumer spending on media and entertainment forecasted to triple in the country by 2020, it is indispensable to continue to foster business relationships with, and opportunities in, this market.

INTENDED ACTIONS – SOUTH AFRICA

Outbound mission: Support the Trade Commissioner Service in Johannesburg in their efforts to take a delegation to Canadian Producers to MIP Africa 2025.

Inbound mission: Host a South African screen-content delegations in February 2026 at the CMPA’s annual conference *Prime Time*.

UK

The UK television industry is a major international success story and a natural co-production partner for Canada. This market produces thousands of hours of content each year. In 2019 the industry generated a total spend of £1.95 billion, a 17% increase on the previous year’s £1.84 billion and the second highest figure since these statistics were first recorded. The global theatrical market, which hit a new record in 2019, was worth just over \$42 billion with UK films earning \$10.3 billion, or a 24.6% share.³³

The UK has consistently been Canada’s top or second co-producing partner of choice in the past few decades. In the 2009/10-2018/19 period, the Canada-UK coproduction treaty has been the most used treaty with 164 productions.³⁴ The UK is the second most-important market for the pre-sale of Canadian programs, generating almost CAD \$37 million in revenues in 2014-2015 and 2018-2019 in CMF funded television projects, and the total sales of feature film projects coproduced with the UK achieved over \$95 million over the same period.³⁵

The UK government is very supportive of the industry, with improved lottery-sourced funding and tax concessions. Relaxation of the domestic and by extension international project certification process offers wider opportunities for international co-productions as they are now eligible for direct funding; approximately 25% of funded projects are international co-productions.

³² Ibid.

³³ *We are UK Film* (2019). (<http://www.weareukfilm.com/facts-and-stats>)

³⁴ CMPA (2019) *PROFILE: Economic Report on the Screen-Based Media Production Industry in Canada*, pp.56

³⁵ Communications MDR: Exporting Canadian Screen-based Productions in a Global Market: Trends, Opportunities and Future Directions (2020)



The UK was Canada's third largest export market in the world in 2017, with Canadian exports reaching CAD 17.7 billion, as well as being the largest destination for Canadian direct investment in Europe. This is in large part due to historical and cultural linkages. EDC position is open and is actively pursuing business in the country and the risk rating is very low. Both Canada and the UK have strongly stated their intentions to form a new trade agreement between the two parties if Britain's exit from the European Union results in a withdrawal from the Canada-European Union Comprehensive Economic and Trade Agreement.³⁶

The Canada – UK relationship is a very important one – the co-production treaty has been the most used one over the last 7 years, with over 100 productions.

Key events in the UK for the Canadian screen-content industry include *Content London and Focus*:

- *Content London* is a world-class event that features over 200 speakers in a variety of audio-visual roles including commissioners, producers, financiers, technologist, agents, and writers. The event delivers highly desired access to major global media players who, given the opportunity to connect with Canadian screen-content producers either at the event or in Canada, may develop business synergies.
- *Focus*, The Meeting Place for International Production opens its doors to all the creative screen industries – including film, TV, advertising, animation and games – and it is the only UK trade event where attendees can meet content makers, film commissions, production services and locations providers from over seventy countries. Delegates can discover filming incentives, locations and services to maximise screen value, as well as organise meetings with exhibiting organisations using the online scheduler. The free registration includes the packed content programme. Featuring a roster of expert speakers, who will address the key opportunities and challenges concerning the production industry today.

INTENDED ACTIONS – UK

Virtual mission: Organize Virtual Business Development Day in May 2025 in partnership with the Trade Commissioner Service.

³⁶ <https://www.edc.ca/en/country-info/country/united-kingdom.html>

Outbound mission: To *Content London* in December 2025, 2026, 2027 working with the High Commission of Canada in the UK to host the Canada – UK Co-Production Forum.

US

The United States is the leading exporter of screen-based content in the world. In 2018 the US generated \$24.1 billion in film and television exports, resulting in a trade surplus of \$14.4 billion. The US comprises the largest worldwide market for gross box office sales, amounting to almost \$16.8 billion in 2018. The US and its coproducing partners were responsible for 17 of the top 20 grossing films worldwide in 2018. US films accounted for 56% of the share of the theatrical market in Europe in 2017. American studio films represented 19 of the top 20 films in terms of European box office sales.³⁷

The US is a key trading partner and export market for Canadian television and film and is one of primary markets for the top-selling Canadian television programs. According to the interviewees in the CMPA commissioned study *Exporting Canadian Screen-based Productions in a Global Market: Trends, Opportunities and Future Directions*, the US market tops the list for their ability to generate revenues from sales to distributors, broadcasters and VOD services in that country. The US market is said to be critical to backstop financing for a production, and affords the most valuable license fees for both scripted and unscripted content sales to linear broadcasting and VOD services. Many producers interviewed for the study point to the increasing importance of the US market due to expanding opportunities on US-based SVOD and AVOD services which, some interviewees, consider to be the equivalent to opening up new territories in terms of the overall volume of demand for content that such services represent.³⁸

Key events in the US of import to the Canadian screen-content industry include *South by Southwest (SXSW)*, the *American Film Market (AFM)* and *Kidscreen*:

- *SXSW* presents an unmatched opportunity to learn and network with media professionals across cultural industries. With a focus on discoverability in interactive, film, and music industries, this conference leads the way in exploring up-coming media trends that will shape the future of the audio-visual industry.
- The *AFM* is held each year in Santa Monica, California and attracts more than 7,000 film industry professional from more than 70 different countries. This

³⁷ Communications MDR: *Exporting Canadian Screen-based Productions in a Global Market: Trends, Opportunities and Future Directions* (2020)

³⁸ Communications MDR: *Exporting Canadian Screen-based Productions in a Global Market: Trends, Opportunities and Future Directions* (2020)

marketplace is an indispensable opportunity to network, sell, finance, and acquire films. The main focus of the *AFM* is to facilitate production and distribution deals.

- *Kidscreen* is the best attended and most relevant event for executives in kids' entertainment. This event allows creative minds to engage in critical dialogue concerning key industry issues with programmers, buyers, producers, distribution, licensors, retailers, marketers, digital media managers and even toy companies present.

INTENDED ACTIONS - US

Relationship building: Work with the Trade Commissioner Service in Los Angeles and New York to identify opportunities for collaboration at virtual and in-person events in Canada, the US and internationally where US partners are present.

APPENDIX

Timeline	Market	Intended action
January-25	France	Inbound mission: work with USPA to bring a delegation of French producers to Prime Time 2025
January-25	Ireland	Inbound mission: Work with Screen Producers Ireland to bring in a delegation of Irish producers for Prime Time 2025
January-25	Mexico	Inbound mission: Work with the Trade Commissioner Service in Mexico to bring in a delegation of Mexico producers for Prime Time 2025.
March-25	France	Outbound mission: organize a delegation to Series Mania in March 2025
April-25	Mexico	Virtual mission: Organize Virtual Business Development Day in 2025 in partnership with the Trade Commissioner Service.
May-25	Australia	Outbound mission: delegation to Screen Forever in May 2025
May-25	UK	Virtual mission: Organize Virtual Business Development Day in May 2025 in partnership with the Trade Commissioner Service.
September-25	South Africa	Outbound mission: Support the Trade Commissioner Service in Johannesburg in their efforts to take a delegation to Canadian Producers to MIP Africa 2025.
December-25	UK	Outbound mission: To Content London in December 2025, 2026, 2027 working with the High Commission of Canada in the UK to host the Canada – UK Co-Production Forum.
January-26	Germany	Inbound mission: Work with industry partners to bring in a delegation of German producers for Prime Time 2026.
January-26	South Africa	Inbound mission: Host a South African screen-content delegations in February 2026 at the CMPA’s annual conference Prime Time.
December-26	UK	Outbound mission: To Content London in December 2025, 2026, 2027 working with the High Commission of Canada in the UK to host the Canada – UK Co-Production Forum.
December-27	UK	Outbound mission: To Content London in December 2025, 2026, 2027 working with the High Commission of Canada in the UK to host the Canada – UK Co-Production Forum.
Ongoing	Australia	Ongoing: CMPA will continue to explore networking and B2B meeting opportunities with Australian producers at key festival and market events, as well as share industry trends and shifts in landscape information with SPA colleagues.
Ongoing	France	Relationship building: Support members through our partnership with Telefilm at the events mentioned above. In addition, the CMPA will work with industry partners in France to identify opportunities for collaboration at virtual and in-person events in Canada, France and internationally where French partners are present.



Ongoing	Ireland	Relationship building: Work with Screen Producers Ireland to identify opportunities for collaboration at virtual and in-person events in Canada, Ireland and internationally where Irish partners are present.
Ongoing	US	Relationship building: Work with the Trade Commissioner Service in Los Angeles and New York to identify opportunities for collaboration at virtual and in-person events in Canada, the US and internationally where US partners are present.
Ongoing	Nigeria	Relationship building: The CMPA will continue to work with the Pan African Chamber of Commerce to pursue opportunities within the market.