

THE STRENGTH AND DISTINCTIVE STORYTELLING OF EUROPEAN ANIMATION IN CHALLENGING TIMES

European animation reaffirms its resilience by embracing co-production and adapting to the global shifts affecting the audiovisual sector. Built on creativity, distinctive storytelling and an increasingly professionalised production landscape, the European animation industry showcased its core assets at the 28th Cartoon Movie (March 3–5).

Held in Bordeaux, France, for the tenth time, this leading forum brought together 826 professionals from 42 countries, including 260 buyers — 20% of them first-time attendees. A total of 50 animated feature film projects were presented at different stages of production, reflecting both the main trends and the challenges facing European animation.

KEY FIGURES		
826 participants from 42 countries 443 companies	260 buyers , including 20% of newcomers	Women 44,4% Men 55,1% Non-binary 0,5%

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Cartoon Movie 2026 was officially opened on March 4 at the Bordeaux Congress Centre with welcoming words by Annick Maes, General Director of CARTOON. **Charline Claveau, Vice-president in charge of Culture, Heritage and Regional Languages of the Région Nouvelle-Aquitaine**, followed through underlining the region’s role as “a true cradle” for French animation.



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Among other strengths of the region, she explained that Nouvelle-Aquitaine, France's second-largest animation hub after Paris, has an ecosystem of 1,300 professionals, 30 companies and 25 specialised schools, as well as a €4 million fund granted annually to animation projects.

Frédéric Cros, General Manager of Magelis, Creative industries hub in Angoulême, then emphasised the Charente Department's strong commitment to animation through a production support fund of more than €2 million.



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Cécile Couraudon, Head of Economic Development at Bordeaux Métropole, highlighted, among other aspects, the importance of Cartoon Movie's Coaching Programme, which each year brings together students and teachers from animation schools across the region.



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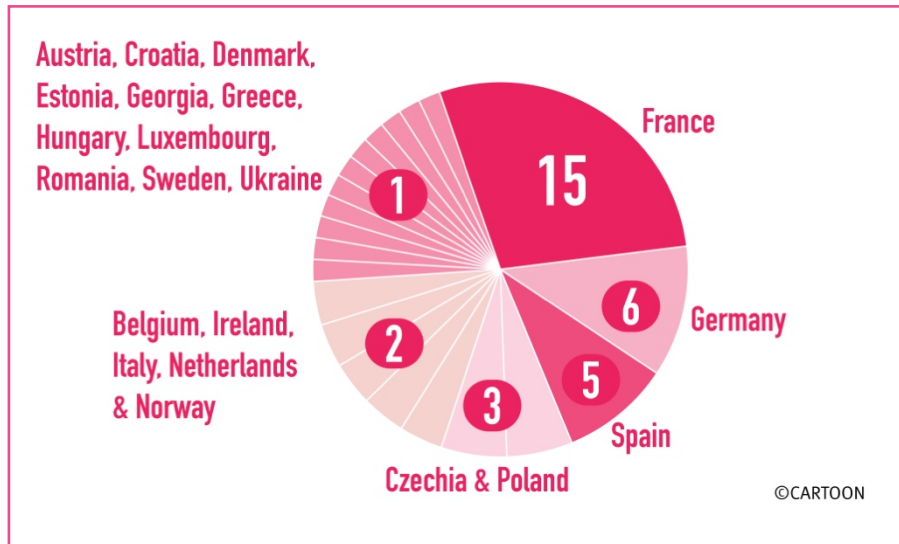
The initiative **“Québec-Canada Land in Europe: A Space for Creation”** was officially presented by Éleine Dumont, General Manager of International Affairs, Exports and Film Marketing at SODEC, and Francesca Accinelli, Chief Program Officer at Telefilm Canada.



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Delving into the Selection

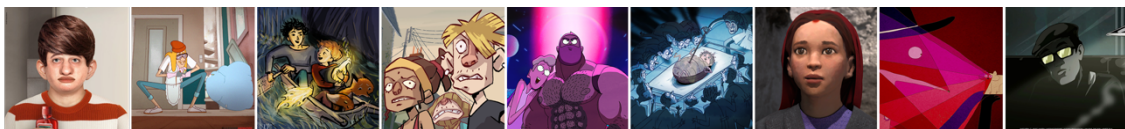
Chosen from a record 150 submissions — a 22% increase on the previous edition — 50 projects from 21 countries were presented to potential co-producers, sales agents, distributors, streaming platforms and investors. The line-up included 30 projects in development (60%), 12 in concept (24%) and 7 in production (14%), along with one sneak preview.



With a total production volume of €275.3 million, the average budget per project amounted to €5.5 million, in line with the previous year. The combined duration reached 69 hours, with an average length of 83 minutes per film. Finally, co-production remained a key financing model with 34 projects (68%).

Reinforcing Cartoon Movie as a key platform for discovering European voices in animation, 61% of the projects were their directors' first feature films, many of which coming from short films or series.

The host region, [Nouvelle-Aquitaine](#), featured nine projects in the selection. Six were supported by the Région in collaboration with ALCA, while others were produced or co-produced by companies based in Bordeaux and the wider region, involving regional co-writers and co-directors and benefiting from additional support from the Charente Department.



© Blaise, *Detective Kibbles*, *Firebird*, *Happy Hunting vs the Apocalypse*, *Jim Queen*, *Night Tram*, *Pangea*, *Saima: Scenes from a Midlife Crisis*, *Smecheria* or *the Confidences of a Cheat*

Diversity at the Heart of Animation

The line-up brought together emerging voices and established filmmakers, combining auteur-driven and audience-focused stories, and productions from independent studios alongside works by internationally acclaimed companies. Among the new projects by

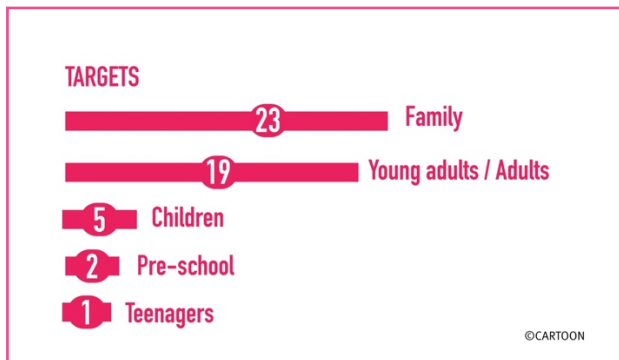
renowned directors were “**Kindred Spirits**” by Tomm Moore (Cartoon Saloon, Ireland), “**Starseed**” by Anca Damian (Aparte Film, Romania), and “**Hakim’s Odyssey**” by Patrick Imbert (Folivari / Solab Films, France).



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The selection also embraced a wide array of genres — from adventure and action to comedy, drama and sci-fi — while venturing into documentary and hybrid forms. A strong engagement with urgent global issues, with themes such as migration, war and exile, was shown across several works, demonstrating animation’s ability to address complex social and political realities with depth and emotional nuance.

In terms of audience segmentation, 56% of the projects were aimed at families and children, while the young-adult and adult segment continued to grow, accounting for 38% of the selection, up from 31% last year.



The programme also featured two projects intended to pre-school audiences: “**Betty Balloon**” by Puk Grasten (Regner Grasten Filmproduktion, Denmark) and “**Onno & Ontje - Friends are the Best Gift**” by Eliza Plocieniak-Alvarez (Blaue Pampelmuse, Germany).



©Betty Balloon, Onno & Ontje – Friends are the Best Gift

2D animation remained the most widely used technique with 54% of the selection, while projects in 3D represented 30% of the line-up.

As in previous years, books and graphic novels remained a key source of inspiration, with nine projects adapted from published works, including **“Blaise”** by Dimitri Planchon & Jean-Paul Guigue (KG Productions, France), **“Cornebidouille”** by Mathias Varin (Les Armateurs, France), **“Igi”** by Natia Nikolashvili (20 Steps Animation, Georgia), **“Monster Mia”** by Verena Fels (arx anima animation studio, Austria), **“Nine Lives Left”** by Zacharias Mavroeidis (Wild At Heart, Greece), **“Pirate Mo and the Legend of the Red Ruby”** by Florian Westermann (Ulysses Filmproduktion, Germany), and **“Sam & Julia”** (Submarine Animation, Netherlands), among others.



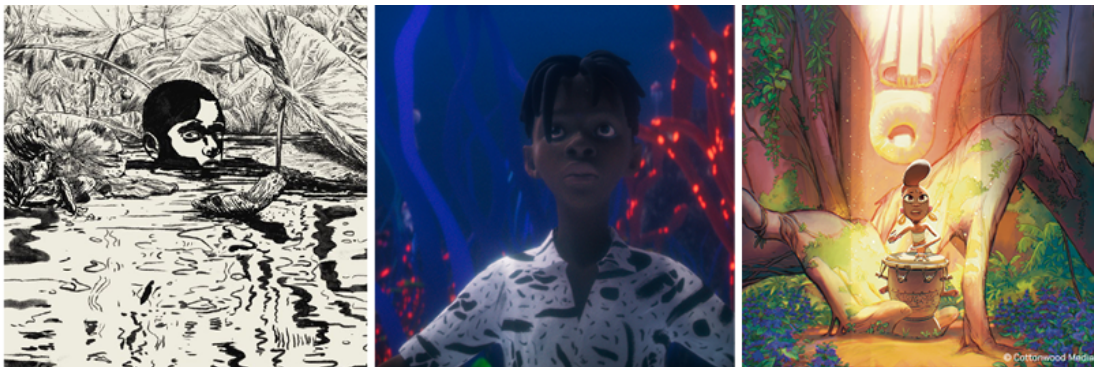
©Blaise, Cornebidouille, Hakim’s Odyssey, Igi, Monster Mia, Nine Lives Left, Onno & Ontje – Friends are the Best Gift, Pirate Mo and the Legend of the Red Ruby, Sam & Julia

Reflecting a growing emphasis on representation and diverse perspectives in European animation, 38% of the projects placed diversity and inclusion at the heart of their narratives. Among the projects featuring characters with different types of disabilities were **“Akira’s Flying Wheelchair”** by Marco Balsamo (TeamTO Films, France), **“DREAMERS - The Hunt for Shadowclaw”** by Christopher Jenkins (parapictures Film Productions, Germany), and **“The Wild and the Tame”** by Tibor Bánóczki & Sarolta Szabó (Domestic Infelicity, Hungary).



©Akira's Flying Wheelchair, DREAMERS – The Hunt for Shadowclaw, The Wild and the Tame

This year's selection included five projects rooted in African stories with strong involvement from writers and production companies from Ivory Coast, Nigeria, Rwanda, and South Africa.



©Ejo, Starseed, The Heart of the Djembe

Women continued to gain ground in this year's selection, with 39% of projects directed or co-directed by women, 34% produced by women, and 62% featuring at least one main female character.

Eight of the projects selected for this year's Cartoon Movie have previously participated in the event – or in other CARTOON initiatives – at earlier stages of development. Among others, “**Aya in the Desert**” by Julia Horrillo Pla (Alhena Production, Spain) and “**Silence Sometimes**” by Álvaro Robles (Filmmakers Monkeys, Spain) were first presented at [Cartoon Springboard](#), the pitching event dedicated to young talents from European animation schools.



©Aya in the Desert, Silence Sometimes

Cartoon Movie 2026 full selection is available [here](#).

Top 10 projects that attracted the most attention from buyers (Development & Production) were:

1. **“Kindred Spirits”** by Cartoon Saloon (IE) & Folivari (FR)
2. **“Dreamwalker”** by Vivi Film (BE), Parmi les lucioles films (FR) & Lighthouse Studios (IE)
3. **“Once Upon an Egg”** by Keplerfilm (NL), A Private View (BE) & Hausboot (CZ)
4. **“Akira's Flying Wheelchair”** by TeamTO Films (FR)
5. **“The Heart of the Djembe”** by Cottonwood Media (FR), Booya Studio (CI) & Umedia (BE)
6. **“Flick”** by WIZZ (FR) & FOST (FR)
“Hakim's Odyssey” by Folivari (FR) & Solab Films (FR)
7. **“Pangea”** by Miyu Productions (FR)
8. **“Night Tram”** by Negativ (CZ), Sacrebleu Prod. (FR), BFilm (SK) & ART SHOT (LT)
“Starseed” by Aparte Film (RO), Special Touch Studios (FR), Wrong Men (BE), Quetzalcoatl (BE), Yzanakio (CA) & Known Associates Group (ZA)
9. **“Blaise”** by KG Productions (FR)
10. **“Cosmo Pincess”** by Sacrebleu Productions (FR)
“Kokum” by Paul Thiltges Productions (LU) & Special Touch Studios (FR)

Top 10 European co-productions with the largest audiences at their presentations were:

1. **“Kindred Spirits”** by Cartoon Saloon (IE) & Folivari (FR)
2. **“Dreamwalker”** by Vivi Film (BE), Parmi les lucioles films (FR) & Lighthouse Studios (IE)
3. **“The Heart of the Djembe”** by Cottonwood Media (FR), Booya Studio (CI) & Umedia (BE)
4. **“Once Upon an Egg”** by Keplerfilm (NL), A Private View (BE) & Hausboot (CZ)
5. **“Kokum”** by Paul Thiltges Productions (LU) & Special Touch Studios (FR)
6. **“Night Tram”** by Negativ (CZ), Sacrebleu Productions (FR), BFilm (SK), ART SHOT (LT)
7. **“Saima: Scenes from a Midlife Crisis”** by Alexandra Film (EE), Adriatic Animation (HR) & Avec ou sans Vous (FR)
8. **“Starseed”** by Aparte Film (RO), Special Touch Studios (FR), Wrong Men (BE), Quetzalcoatl (BE), Yzanakio (CA) & Known Associates Group (ZA)
9. **“Kigali Night”** by Parmi les lucioles films (FR), Eklektik Productions (BE) & Melusine Productions (LU)
“Monster Mia” by arx anima animation studio (AT), Peng! Boom! Tschak! - Films (DE), arx anima MD (DE) & Arxlight Pictures (ES)
10. **“Halloween vs. Day of the Dead”** by Studio 100 International (DE) & 3Doubles Producciones (ES)

Building New Partnerships Beyond Europe

One of this year’s new initiatives was the launch of [Québec-Canada Land in Europe: A Space for Creation](#), a programme designed to foster international co-production with Europe. The initiative featured a dedicated session presenting six projects — three from Québec and three from other Canadian provinces — seeking European partners and was organised in collaboration with SODEC and Telefilm Canada.

The selected titles from Quebec were **“Jane, the Fox and Me”** by Embuscade Films, **“Marguerite and the Duke”** by 10th Ave Productions, and **“The Mountain of Dreams”** by Carpediem Film & TV. Hailing from other Canadian provinces were **“Puddle Jumpers”** by Flying Kraken Creative Studios, **“Shanghai Ballade”** by Lofty Sky Pictures, and **“The President’s Daughter”** by Quarterlife Crisis Productions.



©Jane, the Fox and Me, Marguerite and the Duke, The Mountain of Dreams, Puddle Jumpers, Shanghai Ballade, The President's Daughter

Awards, Talent and Industry Insights

The [Cartoon Movie Tributes](#) and the [Eurimages Co-Production Development Award](#) were awarded during the forum among other recognitions.

Voted by the industry professionals attending the event, the **Cartoon Movie Tributes** recognised companies and individuals whose work had made a significant impact on the European animation industry over the previous year.



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The **Producer of the Year** prize was awarded to France's **Special Touch Studios**, Luxembourg's **Paul Thiltges Distributions**, Belgium's **Lunanime & Need Productions**, and Canada's **Yzanakio** for **"Allah Is Not Obligated"**, Zaven Najjar's feature debut.

The **Distributor of the Year** award was presented to Paris-based **Les Films du Préau**, an independent company focused on high-quality films for young audiences whose +200 titles catalogue include **"Living Large"**, **"The Gruffalo"** and **"Petite Casbah"**.

The **Director of the Year** award went to Reza Memari for **"The Last Whale Singer"**, his second feature after **"Richard the Stork"**. Presented at Cartoon Movie at different stages —

concept in 2018, development in 2020, and production in 2025 — the film has been sold in over 30 territories.

Meanwhile, the **Eurimages Co-Production Development Award**, an initiative of the Council of Europe’s Eurimages Fund to encourage international co-production from the earliest stages of an animation project, went to **“Acorn’s Adventure”** by Filip Mašek, produced by Pure Shore (Czech Republic) in co-production with Fabian&Fred (Germany).



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Additional recognition came from **Les Femmes s’Animent**, a French organization dedicated to promoting gender equality in the animation industry that this year awarded its label to **“Night Tram”** by Michaela Pavlátová (Negativ, Czech Republic) and gave a special mention to **“The Heart of the Djembe”** (Cottonwood Media, France).



©Night Tram, The Heart of the Djembe

Cartoon Movie also hosted a new edition of **Cartoon Talks**, an initiative fostering synergies between animation and related sectors through three sessions on green practices in

animation and the evolving relationship between XR and cinema. The programme concluded with one-to-one meetings, enabling animation, gaming, and transmedia professionals to exchange ideas and explore collaborations.



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Looking ahead, the **Coaching Programme** brought together around 80 students from 25 animation schools in Nouvelle-Aquitaine. Besides offering insights into the industry and project development through talks by emerging and established creators, the initiative also included a **Job Fair** and an **Elevator Pitch Workshop**.



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This year's event recorded a notable gender balance, with 55.1% male participants, 44.4% female participants, and 0.5% persons identifying as non-binary.

SURVEY

The results of the survey conducted by CARTOON at the end of Cartoon Movie underline the important role played by the event in the development of the industry.

- 97% of the respondents believe they gained business opportunities (54% on-site and 43% ongoing). Among those who answered yes, 26% report already seeing concrete results or projects underway (co-development, co-production, distribution, etc.)
- 88% of respondents consider the networking opportunities to be strong or very strong.
- 91% say that Cartoon Movie helped them increase their knowledge of the animation market.
- 100% of respondents would recommend Cartoon Movie to colleagues in the film or audiovisual industry.
- 63% of respondents say they would like to return to Cartoon Movie in 2027.

CSR INITIATIVES AT CARTOON MOVIE 2026

Building on its commitment to sustainability and the achievement of ISO 20121 certification, the first CSR report was published in early 2025. The processes and efforts implemented have been continued at Cartoon Movie 2026.

CARTOON collaborated with Ecoprod, the leading initiative on sustainable film production in France, promoting and highlighting films and crews working towards reducing the environmental footprint of the film and TV industry.. During the event, Ecoprod presented the Green Animation Guide, aiming to develop industry wide standards for sustainable production method and now aiming the launch of the industry consultation phase.

The Cartoon Events app was also optimised to limit printed materials and CO₂ emissions.

CARTOON strives to set an example in CSR within the European animation sector. Survey results highlight that 93% of respondents feel our communications clearly address discrimination and harassment. 94% consider the event sufficiently diverse, and 96% believe gender representation was well balanced. In addition, 46% reported having consulted the “Our values” and/or “Our sustainable commitment” pages.

CARTOON remains committed to reducing the event’s overall carbon footprint. In this context, the mobility policy has been updated, and CARTOON will no longer organize shuttle services. This change is intended to encourage the use of public transportation. In addition, on Thursday, 5 March, a fully vegetarian lunch was served to all participants, significantly reducing the carbon footprint of the event.

To learn more, we invite you to read our [CSR report](#).

The next edition of Cartoon Movie will take place from 2 to 4 March 2027.