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## **AUDIOVISUAL PRODUCTION MARKET IN PARANÁ: AN ANALYSIS BASED ON ANCINE'S BRAZILIAN PRODUCT CERTIFICATES<sup>1</sup>**

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Audiovisual production in Paraná has not been the subject of frequent research. In a search I conducted on Google Scholar using the term “cinema and audiovisual in Paraná,” I found a text by Celina Alvetti published in 2009 in the Online Library of Communication Sciences, an article dedicated to the cinema of Curitiba (Alvetti; Areu, 2006); and a paper published in the proceedings of the XX Communication Sciences Congress in the Southern Region (Maier; Yamamoto, 2019), which addresses productions in Curitiba and Londrina. Felipe Leal Alves Ferreira, Misael Pantoja Carneiro, and I published an editorial in RELICI in which we discuss the work of filmmakers and owners of film production companies based on interviews with ten filmmakers residing in Paraná (Ferreira; Carneiro; Gimenez, 2025).

In a previous study that I conducted, based on open data made available by ANCINE<sup>3</sup> concerning two datasets - Regular Economic Agents Registered with ANCINE<sup>4</sup> and Economic Activities of Regular Agents Registered with ANCINE<sup>5</sup> - I identified 425 companies involved in motion picture, video, and television program production activities (CNAE - 5911-1/99) headquartered in Paraná<sup>6</sup>.

Of this number, 299 were located in the Metropolitan Region of Curitiba, corresponding to 70.3%. The metropolitan regions of Londrina and Maringá followed, with 32 and 28 companies, respectively, accounting for 14.1%. The remaining

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<sup>3</sup> <https://www.gov.br/ancine/pt-br/oca/dados-abertos>.

<sup>4</sup> <https://dados.gov.br/dados/conjuntos-dados/agentes-economicos-regulares-registrados-na-ancine>. Acessado em 20/03/2025.

<sup>5</sup> <https://dados.gov.br/dados/conjuntos-dados/atividades-economicas-dos-agentes-regulares-registrados-na-ancine>. Acessado em 20/03/2025.

<sup>6</sup> *A configuração do ecossistema empreendedor cultural do audiovisual paranaense* em Gimenez (2025).



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companies were distributed across a small group of cities in Paraná, mainly Cascavel, Foz do Iguaçu, Ponta Grossa, Toledo, and Umuarama, among others. In other words, the three largest metropolitan regions of Paraná concentrate 84.4% of the companies identified in ANCINE's databases (Gimenez, 2025). However, the information collected from these two databases did not allow the identification of which of these companies were still operating in the market and which were not.

Another open database made available by ANCINE refers to the Brazilian Product Certificates (CPB)<sup>7</sup>, originally established by Provisional Measure No. 2,228-1 of 2001 and regulated in detail by ANCINE Normative Instruction No. 104/2012. The CPB is a mandatory registration for all works intended for export or public communication within Brazilian territory in the market segments regulated by ANCINE, and it is a requirement for obtaining the CRT (Certificate of Title Registration) for Brazilian non-advertising audiovisual works<sup>8</sup>.

This dataset contains the following information for each work registered with ANCINE since 2002: Original title of the work; CPB; CPB issuance date; Status of the work; Type of work; Subtype of work; Classification of the work; Temporal organization; Total duration; Number of episodes (in the case of serialized works); Year of production (initial and final); Initial destination segment; Work produced under an international co-production regime; Applicant; Applicant's CNPJ; State and Municipality of the applicant.

These data are updated monthly and thus make it possible to identify production companies that are effectively active and not merely registered with ANCINE, as is the case with the other two databases used in Gimenez (2025).

In this editorial, I use data from the period between 2003 and 2025<sup>9</sup> on CPBs issued by ANCINE to describe the dynamics of non-advertising audiovisual production

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<sup>7</sup> <https://dados.gov.br/dados/conjuntos-dados/obras-nao-publicitarias-brasileiras-registradas-na-ancine>. Acessado em 13/06/2026.

<sup>8</sup> <https://www.gov.br/pt-br/servicos/obter-certificado-de-produto-brasileiro>

<sup>9</sup> Não houve emissão de CPB para produtora paranaense em 2002.



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in Paraná, addressing the production companies active<sup>10</sup> in this market, the types of audiovisual productions carried out, and their geographical distribution. However, in the next section, I present a brief overview of the data for Brazil as a whole and the regional differences before addressing the case of Paraná.

### **GEOGRAPHICAL DISTRIBUTION OF PRODUCTION COMPANIES AND CPB-CERTIFIED PRODUCTIONS IN BRAZIL<sup>11</sup>**

The spreadsheet consulted contains data for 62,129 works registered with ANCINE between 2002 and May 2026, distributed across 10 types: animation, documentary, fiction, journalism, sports events and manifestations, presenter-led talk shows, reality shows, religious, variety shows, and music videos. There are 3,993 works categorized as “unclassified” between 2003 and 2012.

Animation, documentary, and fiction together account for 60.06% of the registered works, representing 5.81%, 24.91%, and 29.34%, respectively. Another frequent category is music videos, accounting for 23.77%. The remaining types of products are less frequent, corresponding to 16.17% of the total registered during the period. Although they are included in the database, Brazilian non-advertising audiovisual works in the categories of Journalism and Sports Events and Manifestations are exempt from the issuance of a CPB. The same applies to works produced for institutional purposes.

All Brazilian states and the Federal District have works registered with ANCINE during this period; however, the data for 2002 contain only two records - one from São Paulo and one from Rio de Janeiro. Companies headquartered in São Paulo and Rio de Janeiro account for 72.33% of the registrations requested during the entire period,

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<sup>10</sup> I note that this information refers only to Paraná's audiovisual production that obtained a CPB. There may be productions and production companies that do not appear in this dataset for various reasons. However, I believe that the use of these data in the analysis carried out here provides a good approximation of Paraná's audiovisual industry.

<sup>11</sup> Due to the large volume of data, all tabulations were carried out with the aid of an artificial intelligence tool (ChatGPT), and the analyses are my own.



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with 24,340 registrations from São Paulo and 20,597 from Rio de Janeiro<sup>12</sup>. Six other states (RS, MG, BA, PR, SC, and PE), together with the Federal District, accounted for 20.19% of the registered products. Companies from the remaining states of the country were responsible for slightly less than 7.5% of the product registrations. Table 1 presents the period of presence of each federative unit with CPB issuance.

Tablea 1 – States with CPB issuance – 2002 a 2026 (until May)

Region	State	Period	Region	State	Period
Norte	Acre	2005; 2015 a 2025	Nordeste	Alagoas	2007; 2008; 2010 a 2026
	Amazonas	2005; 2007 a 2026		Bahia	2003 a 2026
	Amapá	2013; 2015 a 2022; 2024 a 2026		Ceará	2003 a 2026
	Pará	2005 a 2011; 2013 a 2026		Maranhão	2004; 2008 a 2026
	Rondônia	2016 a 2026		Paraíba	2005; 2007; 2009 a 2026
	Roraima	2011; 2016 a 2018; 2020 a 2026		Pernambuco	2004 a 2026
	Tocantins	2007; 2010; 2011; 2013; 2015 a 2026		Piauí	2003; 2005; 2006; 2008; 2010 a 2012; 2014 a 2026
Centro-oeste	Distrito Federal	2004 a 2026	Rio Grande do Norte	2004 a 2006; 2008; 2010 a 2026	
	Goiás	2003 a 2026	Sergipe	2007; 2010 a 2026	
	Mato Grosso	2004 a 2008; 2010; 2012 a 2026	Sudeste	Espírito Santo	2004 a 2026
	Mato Grosso do Sul	2005 a 2026		Minas Gerais	2003 a 2026
Paraná	2003 a 2026	Rio de Janeiro		2002 a 2026	
Sul	Rio Grande do Sul	2003 a 2026	São Paulo	2002 a 2026	
	Santa Catarina	2003 a 2026			

Source: Elaborated by author (2026)

The analysis of the data presented in Table 1 shows that, beginning in the mid-2010s, audiovisual production with CPB issuance became present in most federative

<sup>12</sup> Between 1995 and 2017, despite the growing presence of other Brazilian states, the production of Rio de Janeiro and São Paulo accounted for 81.32% of all Brazilian films released in theaters between 1995 and 2021 (Gimenez, 2021).



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units in an almost continuous manner. In seven states, this production remained continuous from 2003 to 2026 (BA, CE, MG, GO, and the three states of the Southern Region). Another three states (PE, ES, and the Federal District) have had audiovisual products with CPB since 2004. Finally, it can be observed that almost all states in the Northern Region did not have a constant presence in audiovisual production registered with ANCINE during the first decade of the twenty-first century. However, all of them, beginning in different years, came to have continuity in production: Amazonas from 2007 onward; Pará since 2013; Acre and Tocantins from 2015 onward; Rondônia beginning in 2016; and Roraima since 2020.

Within this national context, in which there is a high concentration of CPBs issued in the states of São Paulo and Rio de Janeiro, a similarly high concentration of production companies in these two states can also be observed<sup>13</sup>. However, with the increasing entry of production companies from other states into this market, the concentration rate of companies in São Paulo and Rio de Janeiro declined significantly.

Table 2 presents the number of production companies that obtained CPBs in each federative unit at three points in time, covering a 20-year period (2005, 2015, and 2025). In 2005, Rio de Janeiro had the largest number of production companies with CPB issuance (253, 45.26%), followed by São Paulo (189, 33.81%). That year, the two states accounted for 79.07% of the total. In 2015, this figure fell to 65.78%, with São Paulo assuming first place (615, 39.78%), followed by Rio de Janeiro (402, 26.00%). Finally, in 2025, the share of the two states declined to 52.10%, with 702 production companies in São Paulo (32.83%) and 412 in Rio de Janeiro (19.27%).

This declining participation of the Rio-São Paulo axis was accompanied by growth in the number of federative units represented in each period - 16 in 2005, 24 in 2015, and 27 in 2025 - as well as by increased participation from some states. For example, Minas Gerais and Rio Grande do Sul, which each represented 4.11% in 2005, increased to 7.20% and 6.08%, respectively, in 2025. In the Northeast, Bahia

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<sup>13</sup> For another perspective on this concentration, see Gimenez (2023), which analyzes the origin of Brazilian films released in movie theaters between 1998 and 2021, disaggregated by federative units.



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rose from 1.97% to 5.10%, and Pernambuco from 1.43% to 3.65%. In the South, Paraná fluctuated from 1.97% in 2005 to 3.69% in 2015, before declining to 3.32% in 2025.

Table 2 – Number of production companies by federation unit

UF	2005		2015		2025	
	Produtoras	%	Produtoras	%	Produtoras	%
SP	189	33,81	615	<b>39,78</b>	702	<b>32,83</b>
RJ	253	<b>45,26</b>	402	26,00	412	19,27
MG	23	4,11	80	5,17	154	7,20
RS	23	4,11	96	6,21	130	6,08
BA	11	1,97	42	2,72	109	5,10
PE	8	1,43	41	2,65	78	3,65
PR	11	1,97	57	3,69	71	3,32
SC	7	1,25	40	2,59	65	3,04
DF	14	2,50	42	2,72	61	2,85
GO	2	0,36	19	1,23	48	2,25
CE	8	1,43	13	0,84	43	2,01
ES	0	0,00	25	1,62	42	1,96
RN	1	0,18	11	0,71	38	1,78
AM	1	0,18	9	0,58	34	1,59
PA	1	0,18	8	0,52	32	1,50
PB	1	0,18	7	0,45	25	1,17
MA	0	0,00	8	0,52	16	0,75
AL	0	0,00	4	0,26	14	0,65
MS	1	0,18	8	0,52	13	0,61
MT	3	0,54	8	0,52	13	0,61
PI	1	0,18	3	0,19	9	0,42
TO	0	0,00	1	0,06	9	0,42
AC	1	0,18	1	0,06	6	0,28
SE	0	0,00	5	0,32	6	0,28
RO	0	0,00	0	0,00	4	0,19
RR	0	0,00	0	0,00	3	0,14
AP	0	0,00	1	0,06	1	0,05
Total			1.546	100,00	2.138	100,00

Source: Elaborated by author (2026).

Another way to perceive this decline in the regional concentration rate of this market is to examine how many states account for approximately 90% of the total number of production companies in each year. In 2005, five states (RJ, SP, MG, RS, and DF) represented 89.80% of the production companies. Ten years later, in 2015,



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the combined number of production companies from the first eight states reached 88.94% (SP, RJ, RS, MG, PR, BA, DF, and PE). By 2025, it took 12 states to reach 89.57% (SP, RJ, MG, RS, BA, PE, PR, SC, DF, GO, CE, and ES).

Finally, concluding this section on the participation of each federative unit in audiovisual production certified by ANCINE, it should be noted that Minas Gerais, Rio Grande do Sul, Bahia, Pernambuco, Paraná, Santa Catarina, and the Federal District have shown strong relative performance, consistently ranking among the ten states with the highest number of active production companies in all three years analyzed.

### **AUDIOVISUAL PRODUCTION IN PARANÁ REGISTERED WITH ANCINE**

The data relating to Paraná<sup>14</sup> indicate the presence of 292 organizations and 217 independent producers who applied for the registration of 1,586 works between 2003 and 2025<sup>15</sup>. Of these, 1,248 (78.69%) were produced by legal entities and 338 (21.31%) by individuals. Thus, although the number of individuals is not much smaller than that of legal entities, the proportion of works produced is one per individual to four per legal entity.

The first records of works from Paraná appeared in 2003, all produced by companies headquartered in Curitiba. They consisted of two documentaries (short films), two fiction works (one short and one feature film), and one unclassified work (short film). *O Preço da Paz*, directed by Paulo Morelli and produced by M A Produções Artísticas e Culturais Ltda ME (Maurício Appel), was the first fiction feature film produced in Paraná to be registered with ANCINE.

In 2004, 11 registrations were made (10 from Curitiba and one from Pinhais), comprising seven fiction works, one animation, and three unclassified works. Among the fiction works, three were feature films – *A Cela de Foucault* (Beija Flor Filmes Ltda), *Oriundi*, and *Cafundó* (Laz Audiovisual Ltda).

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<sup>14</sup> I did not consider the 2026 data, as they only extend through the month of May.

<sup>15</sup> Of this total, 71 are classified under the “unclassified” category.



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In the third year of the series, 2005, another 18 products were registered, including eight fiction works, four documentaries, and six unclassified works. Three works were produced by companies headquartered in Ponta Grossa, while the remainder originated in Curitiba. Within this group, four feature films were produced (one documentary and three fiction films): *Congada da Lapa* (Laz Audiovisual Ltda); *Onde os Poetas Morrem Primeiro* (Irmãos Wagner Audiovisual Ltda); *Cruz e Sousa - O Poeta do Desterro* (Usina de Kyno Ltda); and *A Dor para uma Mudança* (Leonardo Cassio da Cruz Teixeira ME). Thus, in the first three years of registration of audiovisual works from Paraná, 34 products produced by 17 production companies were recorded.

Between 2006 and 2010, 167 CPBs were issued (an average of approximately 33 per year): 19 animations, 26 documentaries, 79 fiction works, 36 unclassified works, two variety programs, and five music videos. In addition to the increase in production, there was also a significant rise in the number of production companies, which reached 56 during this period. In other words, the number of certified products increased fivefold and the number of production companies tripled. This production originated in nine additional municipalities besides the state capital.

In the following five-year period - 2011 to 2015 - there was another leap in the volume of audiovisual production in Paraná. During this period, there were 460 products (an average of 92 per year), distributed across nine categories: 34 animations, 135 documentaries, 195 fiction works, 25 unclassified works, one journalistic work, one presenter-led talk show, four religious works, 16 variety programs, and 84 music videos. This production was carried out by 143 organizations distributed across 11 municipalities in Paraná.

Between 2016 and 2020, there was a slight decline in the number of registered works, totaling 440 (an average of 88 per year). Eight product categories were present during this period: 49 animations, 121 documentaries, 125 fiction works, nine journalistic works, three presenter-led talk shows, one religious work, 14 variety programs, and 118 music videos. Despite the slight decline in the number of registered works compared with the previous period, the number of production organizations



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increased to 219. During this period, the geographical distribution of production companies expanded significantly, with a presence in 22 municipalities in Paraná.

Finally, the last five-year period - from 2021 to 2025 - brought an increase in the number of registered works, reaching the highest value (485), equivalent to an average of 97 registrations per year. In addition to the highest annual average of works, ten product categories were registered during this period: 63 animations, 116 documentaries, 129 fiction works, nine journalistic works, seven presenter-led talk shows, one religious work, 26 variety programs, one sports event and manifestation work, two reality shows, and 131 music videos. During this five-year period, there was a slight increase in the number of production companies, reaching 231, headquartered in 33 municipalities, expanding the geographical distribution of production companies in Paraná by 50%.

Table 3 summarizes these figures, indicating Curitiba's share in the number of production companies in Paraná with issued CPBs in each period. This participation indicates a high concentration rate in the state capital, although it declined from 88.23% in the first three years to 69.07%. In other words, despite this reduction, slightly more than two-thirds of Paraná's audiovisual production with CPB still originates from production companies headquartered in Curitiba.

Table 3 – Audiovisual products with CPB, Curitiba's share, number of producers and municipalities – 2003 a 2025

Periods	Audiovisual products	Curitiba's share	Producers	Municipalities
2003-2005	34	30 (88,23%)	17	3
2006-2010	167	127 (76,05%)	56	10
2011-2015	460	401 (87,17%)	143	11
2016-2020	440	326 (74,09%)	219	22
2021-2025	485	335 (69,07%)	231	33
Total	1.586	1.219 (76,86%)	501	45

Source: Elaborated by author (2026)

Table 4 presents the participation of the ten municipalities in Paraná with the highest production in four categories of audiovisual products with CPB: animation, documentary, fiction, and music video. These four categories totaled 1,451 CPBs, representing 91.48% of the total certified production in Paraná between 2003 and 2025. Thus, the ten municipalities shown in Table 4 account for 95.24% of Paraná's



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production of animation, documentary, fiction, and music video works with CPB between 2003 and 2025.

Table 4 – Ten municipalities with larger certified productions in four categories – 2003 a 2025

Municipality	Animation	Documentary	Fiction	Music vídeo	Total
Curitiba	139	299	452	208	1.098
Londrina	5	17	30	33	85
Maringá	5	13	23	38	79
Cascavel	0	6	10	17	33
Ponta Grossa	1	1	2	17	21
São José dos Pinhais	11	2	3	3	19
Foz do Iguaçu	2	4	8	1	15
Guarapuava	0	1	2	10	13
Ventania	0	0	9	0	9
Pato Branco	0	5	0	5	10
Total	163	348	539	332	1.382

Source: Elaborated by author (2026)

Curitiba accounted for 79.46% of this production, followed by Londrina and Maringá with 6.15% and 5.72%, respectively. The remaining municipalities represented only 8.67%. In general, all municipalities produced more fiction works (39.00%) and fewer animations (11.79%). Documentaries represented the second most produced type of audiovisual work in these municipalities (25.18%), while music videos accounted for 24.02%.

Individually, however, in Londrina, Maringá, Cascavel, Ponta Grossa, and Guarapuava, music video production was the most numerous. São José dos Pinhais produced predominantly animations, whereas Ventania was restricted to fiction. On the other hand, Pato Branco had a production equally distributed between documentaries and music videos.



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## **THE PERFORMANCE OF THE PRODUCTION COMPANIES WITH THE GREATEST PRESENCE IN THE PARANÁ MARKET<sup>16</sup>**

Between 2003 and 2026, 1,620 audiovisual works from Paraná were registered with ANCINE, of which 350 were registered by individuals. The remainder were registered by 292 legal entities. Of this group, 233 production companies obtained the registration of at least one and at most five works, that is, 79.80% of the organizations that obtained CPBs between 2003 and 2026. Another 29 organizations (9.93%) obtained between six and nine CPBs during the same period. Finally, 30 organizations (10.27%) obtained ten or more CPBs, totaling the registration of 598 works (36.91%).

These figures point to a highly fragmented market, with a large number of small-scale production organizations and a small group of organizations with greater productive capacity. It is a market with few barriers to entry, but where long-term survival is difficult.

Table 5 presents information on the 14 production companies with the highest volume of certified production between 2003 and 2026, considering the four most frequent types of products: animation, documentary, fiction, and music video.

The production companies listed in Table 5 operate in the market with a wide variety of combinations of audiovisual products. Processo Multiartes and Kinopus were the only companies to register all four types of products, offering the broadest range throughout their trajectories in the market. Four other production companies offered products in the genres of animation, documentary, and fiction: Zoom, Oger, Grafo, and Moro. Another four production companies offered only documentaries and fiction works: O Quadro, Beija Flor, GP7, and Vigor Mortis. WildLife Films and Tecnokena operated with animations and documentaries. Finally, two production companies specialized in a single product type: Daniel Moreira in music videos and Olaria in documentaries.

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<sup>16</sup> For the analysis presented in this section, the CPBs obtained between 2003 and 2026 were considered.



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This diversity of combinations in audiovisual product offerings suggests that remaining in the market may be the result of several different paths. In other words, when considering a company's strategy in terms of the products or services to be placed on the market, the experience of these production companies appears to suggest several possible alternatives.

Table 5 – Producers with higher volume of CPBs – 2003 e 2026

Producer	Animation	Documentary	Fiction	Music vídeo	Total	Year of the first CPB	Year of the last CPB
Processo Multiartes	1	10	25	22	58	2010	2024
O Quadro Produções	0	6	39	0	45	2011	2025
Beija Flor Filmes	0	8	30	0	38	2003	2025
Zoom Elefante	22	5	10	0	37	2006	2021
Oger Sepol	3	1	31	0	35	2006	2020
Grafo Audiovisual	1	7	27	0	35	2009	2024
Gp7 Cinema	0	16	7	0	23	2008	2026
Daniel Moreira da Silva	0	0	0	23	23	2021	2026
Kinopus	1	7	11	1	20	2013	2025
Wildlife Films	1	16	0	0	17	2024	2024
Tecnokena	11	3	0	0	14	2004	2023
Moro Comunicação	2	8	4	0	14	2008	2018
Vigor Mortis	0	1	13	0	14	2009	2026
Olaria	0	13	0	0	13	2003	2022

Source: Elaborated by author (2026)

Finally, it can also be observed that the 14 production companies have distinct trajectories in terms of longevity in the market. Beija Flor and Olaria are the oldest, with CPBs issued since 2003. Eight production companies obtained their first registrations between 2004 and 2010. O Quadro and Kinopus received their first CPBs in 2011 and 2013, respectively. Lastly, the two most recent production companies to stand out in terms of the number of CPBs received are Daniel Moreira da Silva in 2021 and WildLife Films in 2024. Excluding these two youngest companies, the average number of years that the remaining firms have been active in registering CPBs with ANCINE is 16.67 years.



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## FINAL CONSIDERATIONS

In this editorial, I addressed several aspects of the audiovisual production market in Paraná. Between 2003 and 2026, I observed that this is a highly fragmented market, with a high concentration of production companies in the state capital and a smaller presence in other inland cities, particularly Londrina and Maringá.

Before identifying the companies operating in the Paraná market, I presented a brief overview of the Brazilian market, pointing to a process of geographical deconcentration of Brazilian production companies, somewhat reducing the relevance, at least in numerical terms, of the Rio-São Paulo axis.

The finding that, in the most recent period - 2021 to 2025 - CPBs were granted to 231 production companies in Paraná contrasts with the figures reported in Gimenez (2025), which was based on information regarding production companies registered with ANCINE and identified a total of 425 companies. The survey reported here allows us to conclude that slightly more than half of the production companies registered with ANCINE sought to obtain CPBs for their audiovisual products between 2003 and 2026, as required by the agency's regulations. It can therefore be inferred that production companies that did not submit any CPB applications between 2003 and 2026 may not currently operate in the market.

I would also emphasize that a small number of production companies have been active in this market for more than 15 years. Furthermore, these companies have adopted different forms of participation in the market, offering various combinations of audiovisual product types. I also observe that the audiovisual market in Paraná has low barriers to entry; however, the long-term survival of companies is difficult.

Finally, the diagnosis presented here reveals regional inequalities in the audiovisual production market in Paraná. Perhaps this analysis, combined with others<sup>17</sup>, may inspire public policies to support the sector in the state in a way that

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<sup>17</sup>See the recent study prepared by Sebrae/PR in partnership with the PrFilm Commission, which was released in 2026 and provides a detailed diagnosis of Paraná's audiovisual sector, including market analyses, location mapping, assessments of municipal potential, and guidelines for public policies and the implementation of municipal film commissions.



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reduces the high concentration of companies in Curitiba to the detriment of other regions.

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