HAGMAN GLOBAL STRATEGIES HGS

WORLD VIRTUAL PRODUCTION MARKET VOLUME

March 2026

STUDY OBJECTIVES

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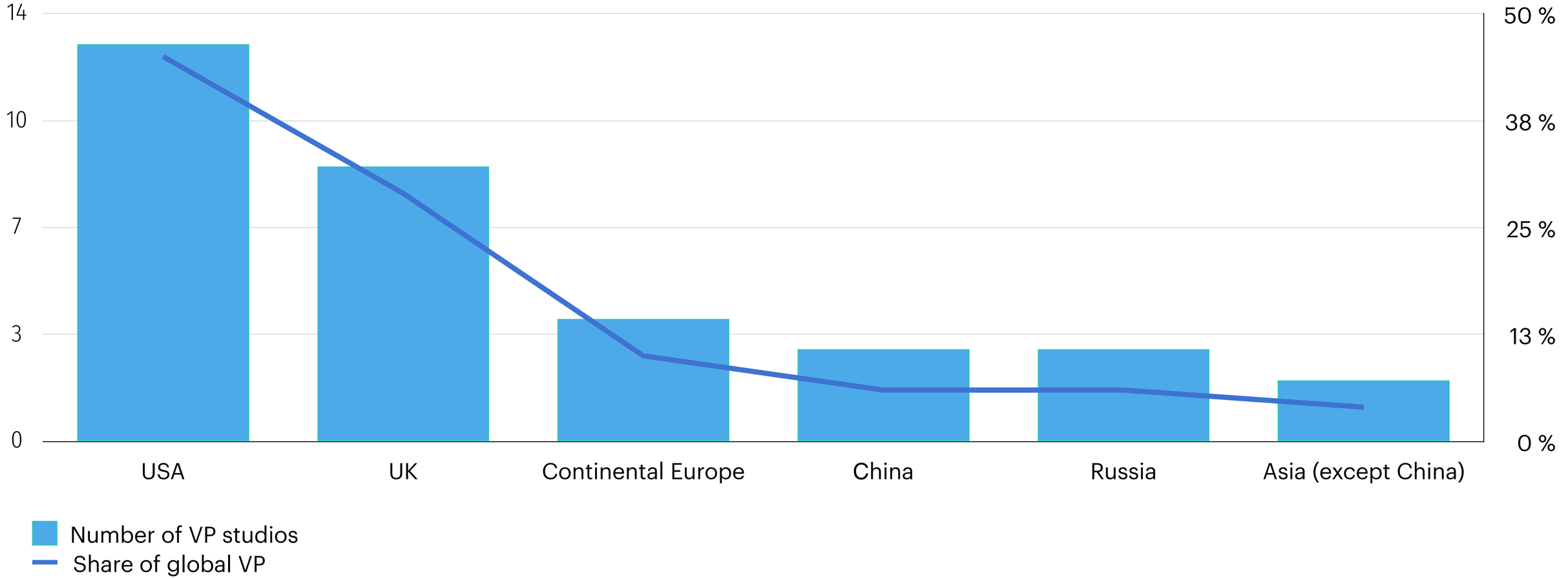
/ determination of points of interchange between technologies, equipment, software and experienced employees

/ analysis of the global virtual production market by the number of ongoing projects in the field of cinema and TV series, short projects (advertising and clips)

/ identify market leaders in terms of the nature of projects implemented in virtual production

GLOBAL DISTRIBUTION OF VIRTUAL PRODUCTION (VP) STUDIOS (2025)



*Large studios producing visual aids for films, TV series, and short films (music videos and TV series)

COMPARISON MAP OF VIRTUAL PRODUCTION LEADERS (2025)

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Studio	Region	Leadership type	Public throughput	Infrastructure capacity	Film / Series strength
ILM / StageCraft (Lucasfilm)	USA	High-end cinematic VP	average (there are few projects, but they are expensive)	several StageCraft volumes (MBS, Pinewood, Manhattan Beach)	very high level (Star Wars, Marvel проекты)
NantStudios	USA	Narrative VP + live production	average	several LED stages + Dynamic Volume System	high level of streaming / TV
Pixomondo (PXO)	USA / Europe	VP + VFX hybrid	average	Sony Innovation Studios Stage 7 operator + several VP pipelines	high level (film / streaming)
Garden Studios	UK	Multi-stage VP production	high	several LED stages	high level (film / TV/ commercials)
Quite Brilliant	UK	XR / commercial VP operator	high	mobile and fixed LED stages	average (more advertising)

COMPARISON MAP OF VIRTUAL PRODUCTION LEADERS (2025)

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Studio	Region	Leadership type	Public throughput	Infrastructure capacity	Film / Series strength
Trilogy Studios	USA	Large VP infrastructure	average	one of the largest VP campuses in the United States	average
Vū Studio	USA	distributed VP network	average	VP Studios network in several cities	average
Amazon Stage 15 (Culver Studios)	USA	studio internal VP	low-medium	big LED stage	average
Versatile / Absen Deqing volume	China	the biggest LED setup	average	the largest LED VP stage (~1700 м²)	average
EFD Studios Madrid	Europe	emerging mega VP hub	average	big LED stage (2000+ м²)	average
XOVP (Moskino / Moscow film cluster)	Russia	throughput is the leader in the number of projects	very high	2 VP pavilions + >1000 м² LED	high level (film / TV / ads)

RESULTS: THREE DIFFERENT TYPES OF VP LEADERS*

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1
LEADERS IN FILMS AND TV SERIES
(the most expensive VP segment)

ILM StageCraft — 2 series and 7 films**

Pixomondo — 6 series and 3 films

NantStudios — 8 series and 2 films

XOVP — 19 series and 12 films

This is the cinematic quality layer.

2
LEADERS IN NUMBER OF PROJECTS
(lots of commercials and short-form)

Garden Studios — 6 films and series & more then 30 TV and short forms

Quite Brilliant — more then 40 ads, short-form, features, TV

XOVP — more than 50 films and series, ads and music videos

This is the industry's throughput layer.

3
INFRASTRUCTURE LEADERS
(largest stages)

Versatile / Absen Deqing — 270° curved LED volume; D=50 m, H=12 m, ~1700 м² LED

Trilogy Studios — cinematic Volume: 157 ft wide × 20 ft tall; Car Process Stage: 6 rolling LED walls, 5 adjustable LED ceiling sections;

EFD Madrid — Filming set area >2,000 m² (out of 5,000 m² headquarters, height >6 m) LED-equipped with curved walls

This is the stage infrastructure layer.

*Initial results of the study have been received. Full results will be published in August 2026.
** Statistics for 2025 based only on public studio data.

RESULTS: DISTRIBUTION OF VP LEADERSHIP BY COUNTRY

In 2025, the global virtual production market can no longer be described as a collection of disparate experiments. It is a system of regional hubs with varying specializations: the US leads in infrastructure maturity and production layer, the UK in film/TV virtual production concentration, continental Europe in the formation of new large venues, China in the scale of physical LED infrastructure, Russia as a highly concentrated market with a single dominant hub, and Asia as a whole as the main region of accelerated growth. According to Mordor Intelligence, North America accounted for 40.55% of the global virtual production market in 2025, and Asia-Pacific remained the fastest-growing macro-region; according to Grand View Research, the virtual production market in Asia-Pacific reached $772.3 million in 2025.

The USA leads in cinema VP. The market demonstrates: a developed physical VP infrastructure, strong production/technology layer, high VP integration into film, streaming, and commercial production

The UK leads in commercial VP: VP is particularly closely integrated into feature film and high-end TV production, not just within the network of independent LED studios. The UK isn't the largest market in terms of sheer physical capacity, but it's one of the most mature in terms of virtual production integration into the film and series pipeline.

Russia leads in the number of completed projects: the Russian VP market is represented by one flagship studio and two smaller local studios. This means, compared to the US and UK, it's a much more concentrated development model, with each studio producing over 60 films and shorts.

The China leads in headquarters and equipment: is claiming leadership in terms of the scale of its physical VP infrastructure. This is a crucial structural signal: Asia is no longer simply catching up with the market, but is beginning to set new benchmarks in terms of size and capital intensity.

THANK YOU FOR YOUR ATTENTION!

For further information please contact us

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