



AV market structure in Europe

Pan-European vs. National view

60th EPRA meeting, Limassol
23-25 October 2024

Laura Ene Iancu

Analyst European TV and VoD Markets

Manager of MAVISE

European Audiovisual Observatory



Observatoire européen de l'audiovisuel
European Audiovisual Observatory
Europäische Audiovisuelle Informationsstelle



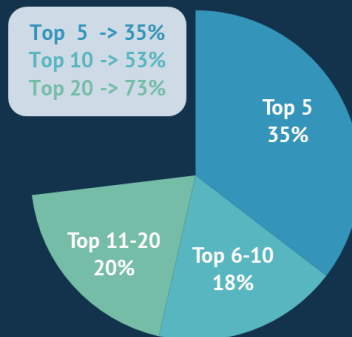
Who are the top grossing
AV players
at pan-European level?

Top 10 AV groups by revenues (2022 / in bnEUR)

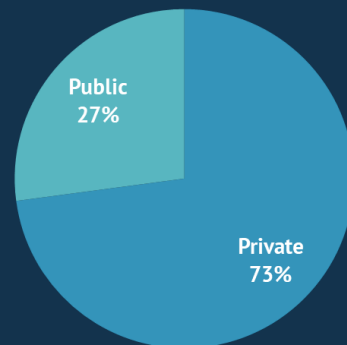
 COMCAST	20.5
 NETFLIX	8.7
 The Walt Disney Company	8.0
 R T L	7.2
 ARD 1	7.0
 BBC	6.6
 CANAL+	5.9
 WB WARNER BROS. DISCOVERY	5.3
 itv	4.4
 ProSiebenSat.1 Media SE	4.2

How does the revenue market structure look at pan-European level?

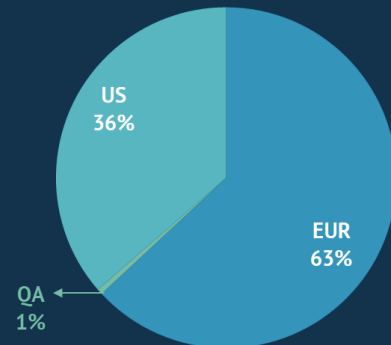
Top 100 AV groups market structure by revenues (2022 / in %)



CONCENTRATION



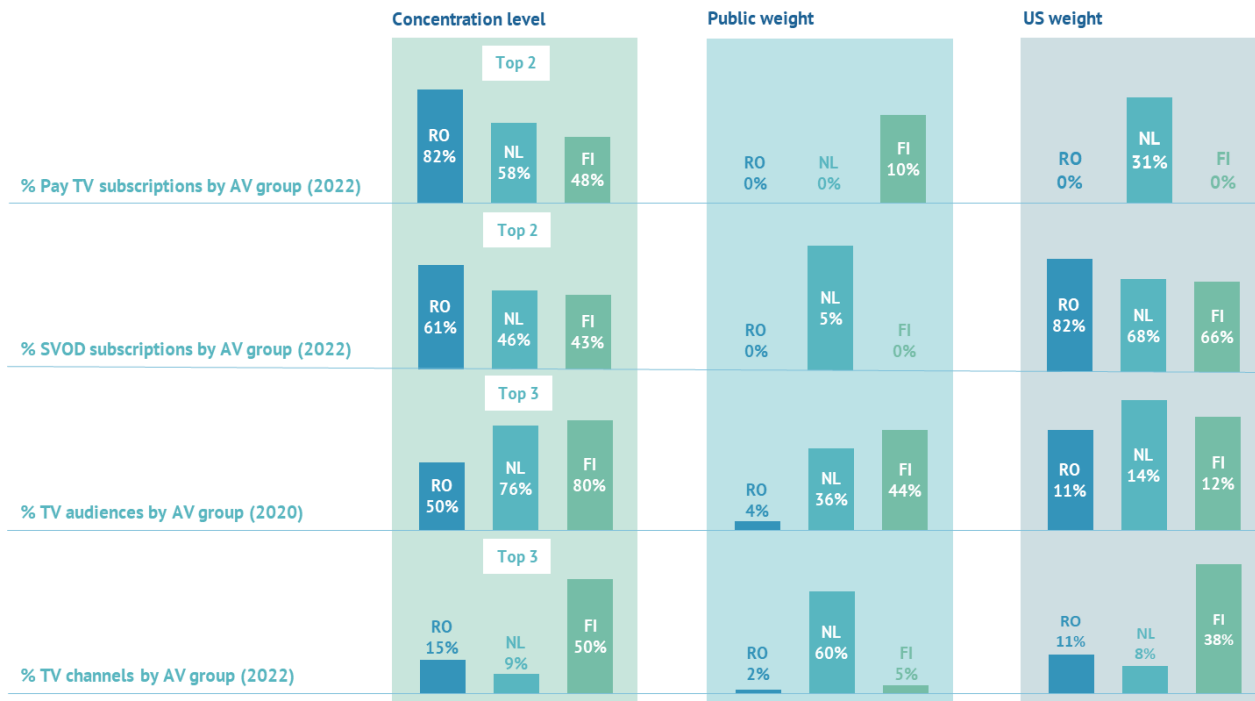
STATUTE



ORIGIN

The pan-European AV market:

● mix of **UNIQUE** local AV market structures



The pan-European landscape of key AV players:

- mix of local, regional and international groups, relatively specialized and resilient

Territorial



Eclectic





THANK YOU!