



Audiovisual fiction production in Europe 2015 - 2024 figures

Agnes Schneeberger
December 2025

A publication of the European Audiovisual Observatory



• <u>Introduction and methodology</u>	3
• <u>Key findings</u>	6
• <u>Production volume and formats of European audiovisual fiction</u>	10
• <u>Origin of European audiovisual fiction</u>	18
• <u>International co-productions</u>	23
• <u>Commissioners of European audiovisual fiction</u>	28
• <u>Producers of European audiovisual fiction</u>	32
• <u>List of tables and figures</u>	36

Introduction and methodology

This report provides an analysis of the production of audiovisual fiction in Europe between 2015-2024(*). For the purposes of this report, audiovisual fiction is defined as live-action fiction TV films and series that have been commissioned by television channels or on-demand services.

The data

- The data underlying this report was provided by Media-press.tv. Media-press.tv systematically reviewed the programming schedules of over 200 TV channels and on-demand services in order to identify original European fiction. The selected services are the respective TV and SVOD audience leaders in the tracked countries. While some smaller channels may also produce some original fiction, most are dedicated to reruns or imported programming.
- The data provided by Media-press.tv were complemented by the European Audiovisual Observatory.

Definitions

- In this report, a “title” refers to either a TV film or a TV season. Each different TV season of a TV series is counted as one title.

(*) EU27, the United Kingdom, Norway and Switzerland

- The titles have been categorized by **format**: TV films/collections; series with 13-episodes-or-less-per-season; series with 14-to-52-episodes-per-season; and series with more-than-52-episodes-per-season. A limited number of TV films have two episodes, but are still considered TV films. Some TV films belong to **collections** (e.g. Germany's "Tatort" or France's "Meurtres à...") with several episodes produced each year. These are either counted as TV films (if different production companies are involved) or as TV series (if the same production company produces all episodes). Some data from previous editions of this report have been restated, as we have converted TV series into collections.
- The **year of production** of a whole-series season is the year of release of the first episode of the season.
- The **country of origin** of an audiovisual fiction programme is the country of the programme's main commissioner. For programmes commissioned by a pan-European SVOD service, the country of origin is determined by the production company.
- **International co-productions** are analysed using either a broad definition (any programme with at least two producing countries) or a stricter definition that excludes "linguistic co-productions" between neighbouring countries (DE-AT, DE-CH, FR-BE, FR-CH, GR-CY, BE-NL, DE-CH, CZ-SK, UK-IE).
- In this report, **"independent production"** is defined as an audiovisual (AV) fiction programme produced by a production company that is not under the control of the broadcaster *commissioning the programme*. This definition does not imply that the producing company retains any rights. Please note that productions from a broadcaster's production unit or subsidiary can be either dependent (if produced for the same broadcaster) or independent (if produced for a broadcaster from a different broadcasting group).
- In this report, **"Europe"** refers to the 27 member states of the European Union, the United Kingdom, Norway and Switzerland.

Please quote this report as: "Audiovisual fiction production in Europe – 2015-2024 figures", European Audiovisual Observatory.

If you wish to reproduce tables or graphs contained in this publication, please contact the European Audiovisual Observatory for prior approval.

Opinions expressed in this publication are personal and do not necessarily represent the view of the European Audiovisual Observatory, its members, or the Council of Europe.

Key findings

Streaming commissioning slowdown in European TV fiction production.

- This is the second consecutive year of an overall downturn in TV fiction production in Europe. There was a 5% year-on-year drop in the number of fiction titles produced in 2024, as well as a 3% reduction in the number of episodes and stagnation in the volume of hours produced.
- In 2024, commissioning by streamers - the growth engine of fiction production – declined notably, by seven percent compared to the previous year. After several years of significant growth, the number of fiction titles commissioned by streamers has been declining since 2023.

Despite the downturn, some of the fundamental characteristics of TV fiction production in Europe remained unchanged.

- Telenovelas and soaps accounted for the bulk (60%) of hours produced.
- More than half of all titles produced were series with 13-episodes-or-less-per-season (52%).

The structure of the fiction production market varies between the leading countries.

- Germany, Greece and Poland were the leaders in terms of volume of hours produced, with large volumes of telenovelas and soaps produced each year. Spain, the United Kingdom, France and Portugal also produce significant quantities of these fiction formats.
- The United Kingdom is the leading producer of series with 13-episodes-or-less-per-season, ahead of France, Germany, Spain and Italy.
- Between 2015 and 2024, almost half (48%) of all TV fiction commissioned by streaming services was produced in just three countries: Spain (17%), the United Kingdom (16%) and Poland (15%). These countries benefited the most from the additional investment by streaming services.

More international non-linguistic co-productions.

- In 2024, international co-productions accounted for 9% of all fiction titles produced, and most of these were TV films and series with 13-episodes-or-less-per-season. On average, over 100 TV fiction co-productions are produced in Europe each year.
- Most international co-productions are between two neighbouring countries that share a language (e.g. France and Belgium, or Germany and Austria). However, non-linguistic co-productions have gradually increased, representing over two-thirds of all co-productions in 2024.
- Non-linguistic co-productions were driven mainly by the United Kingdom (often as a majority co-producer and mostly with the United States, France, Canada and Germany), Germany (often as a minority co-producer and mostly with France and the Nordic countries) and projects between two or more Nordic countries.
- Despite ranking among the top producers of titles, Spain had relatively few co-productions. This may be due to the significant presence of global streamers in new fiction projects. Between 2015 and 2024, Spain ranked first and the United Kingdom second in terms of the number of fiction projects commissioned by global streaming services.

Public broadcasters commissioned 56% of titles and 35% of hours produced.

- In 2024, public service broadcasters commissioned over half of all fiction titles produced in Europe (56%), followed by private broadcasters (30%) and global streamers (14%). However, private broadcasters tend to attribute a bigger share of their commissions to daily soaps and telenovelas, resulting in a higher volume of hours produced (59%) than public service broadcasters (35%) and global streamers (6%).
- The five main commissioners of series with 13-episodes-or-less-per-season in 2024 were the BBC, Netflix, the ARD, Amazon and the NPO, accounting for 26% of high-end TV series commissions.

Production groups: Huge turnover and concentration among the leading groups.

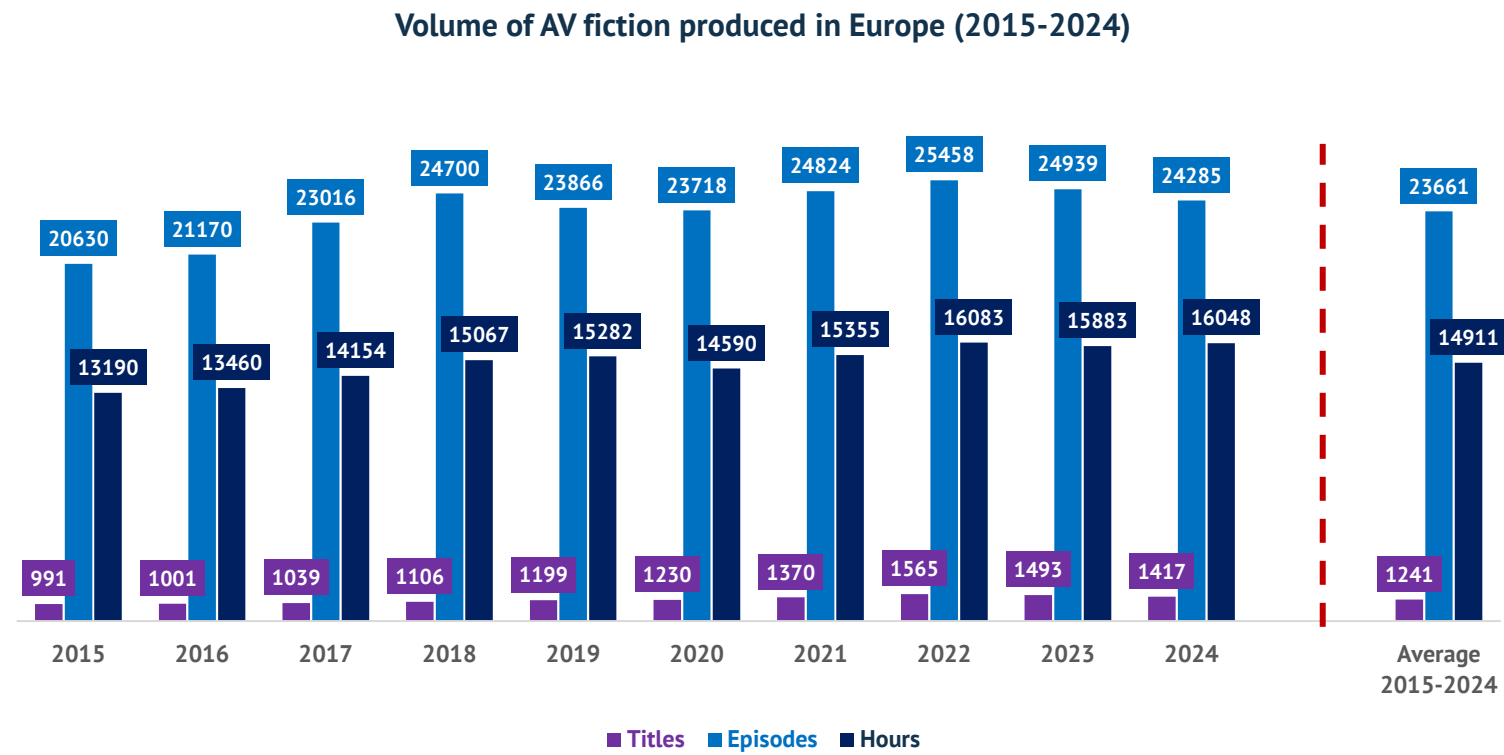
- While more than 2,000 production companies/groups produced at least one fiction title between 2015 and 2024, only 3% of these did so every year for the last ten years. This high turnover can be attributed to the large number of new TV series: on average, first seasons accounted for over half (54%) of all seasons produced each year during this period.
- In 2024, independent productions accounted for 79% of all titles produced, including 10% from production groups affiliated with a broadcaster but working for a third-party broadcaster. Dependent productions accounted for 21% of titles produced.*
- The top producers of TV fiction titles in 2024 were the ARD, the RTL Group, the Banijay Group, the Mediawan-Leonine Alliance, and the ZDF. The Banijay Group (12 countries), the RTL Group (11 countries) and ITV together with Warner Bros. Discovery (seven countries each) had the most geographically diverse selection of production countries.
- The three main producers of independent TV fiction in 2024 were the RTL Group, the Mediawan-Leonine Alliance, and the Banijay Group.
- The top 20 producers accounted for 34% of titles and 57% of production hours in 2024. The concentration of hours is strongly influenced by the production of telenovelas and soaps, as there are comparatively few titles but each one comprises many hours.

* Please see the definition of an 'independent production' in the [methodology section](#).

Production volume and formats of European audiovisual fiction

This is the second consecutive year of an overall downturn in TV fiction production in Europe.

- In 2024, there was a five percent year-on-year drop in the number of fiction titles produced, as well as a 3% reduction in the number of episodes and stagnation in the volume of hours.
- On average, over 1 200 titles, 23 000 episodes and 14 000 hours are produced in Europe each year.

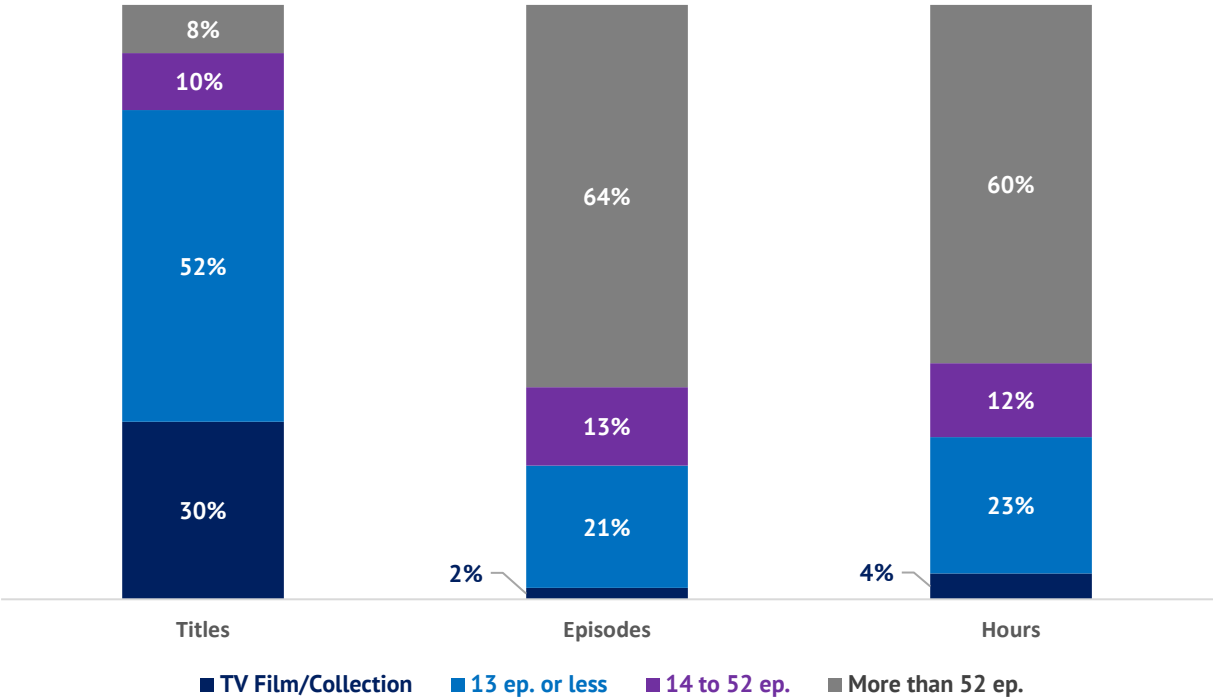


Source: European Audiovisual Observatory analysis of Media-press.tv data

Daily soaps account for just 8% of titles but 60% of production hours.

- In contrast, TV films and collections represent 30% of titles, yet account for just 4% of hours.
- Series with 13-episodes-or-less-per-season account for 52% of titles and 23% of hours.

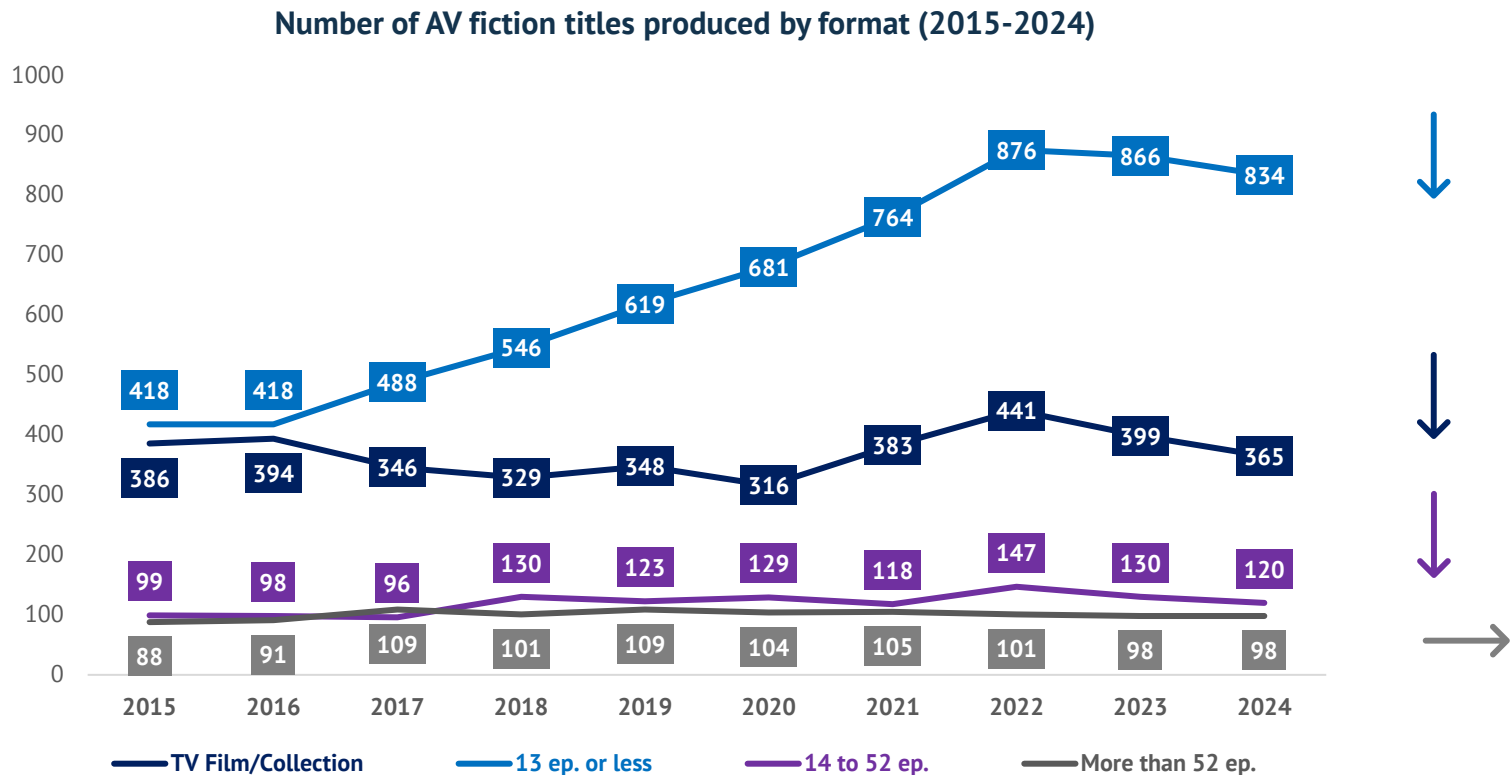
Breakdown of fiction titles, episodes and hours produced (average 2015-2024)



Source: European Audiovisual Observatory analysis of Media-press.tv data

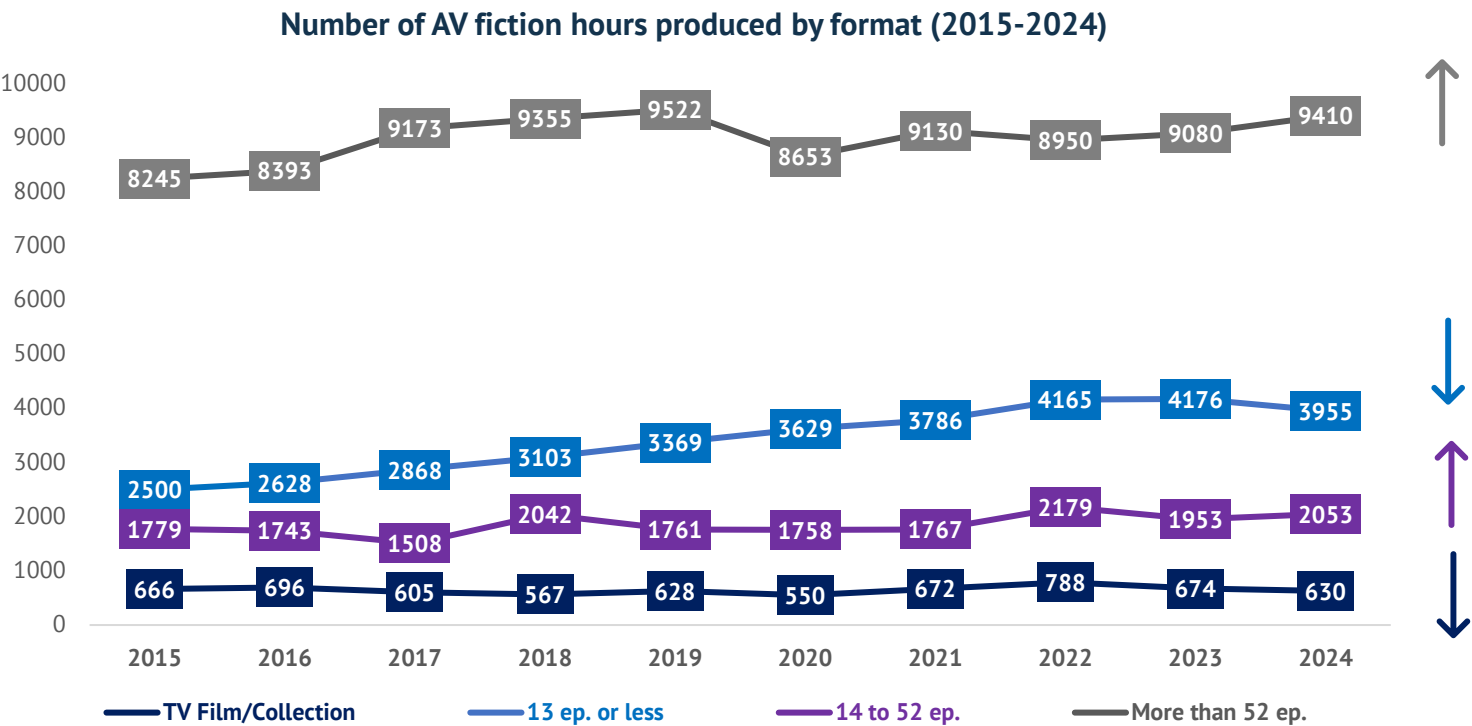
The downturn continues, with the number of TV fiction titles falling or stagnating across all formats.

- Despite the downward trend (minus four percent), series with 13-episodes-or-less-per-season continue to represent the most prominent TV series format.
- The downturn was the strongest among TV films and collections (minus nine percent) and series with 14-to-52-episodes-per-season (minus eight percent).



Mixed trends: While the number of hours of longer formats produced in 2024 grew, those of shorter formats declined.

- Production hours increased for daily soaps/telenovelas (plus four percent) and series with 14-to-52-episodes-per-season (plus five percent).
- However, the volume of hours of TV films (minus six percent) and high-end series with 13 episodes or less (minus five percent) contracted compared to the year before.

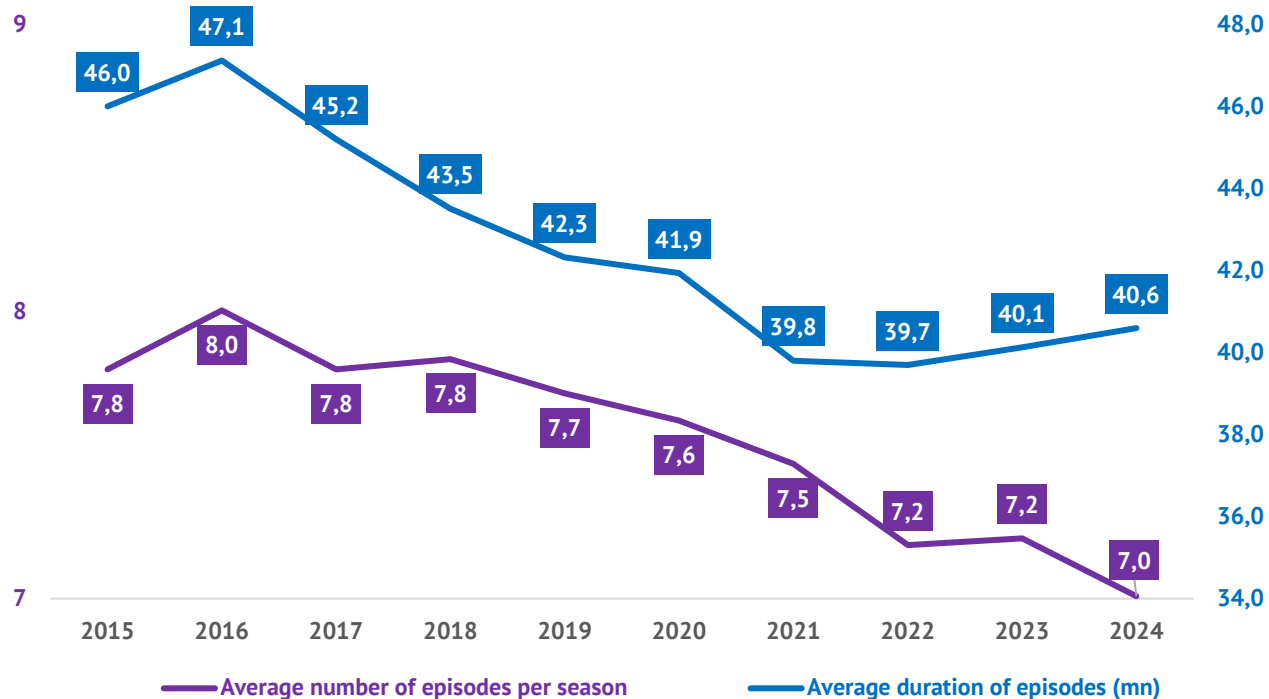


Source: European Audiovisual Observatory analysis of Media-press.tv data

Series with 13-episodes-or-less-per-season increasingly have fewer and shorter episodes.

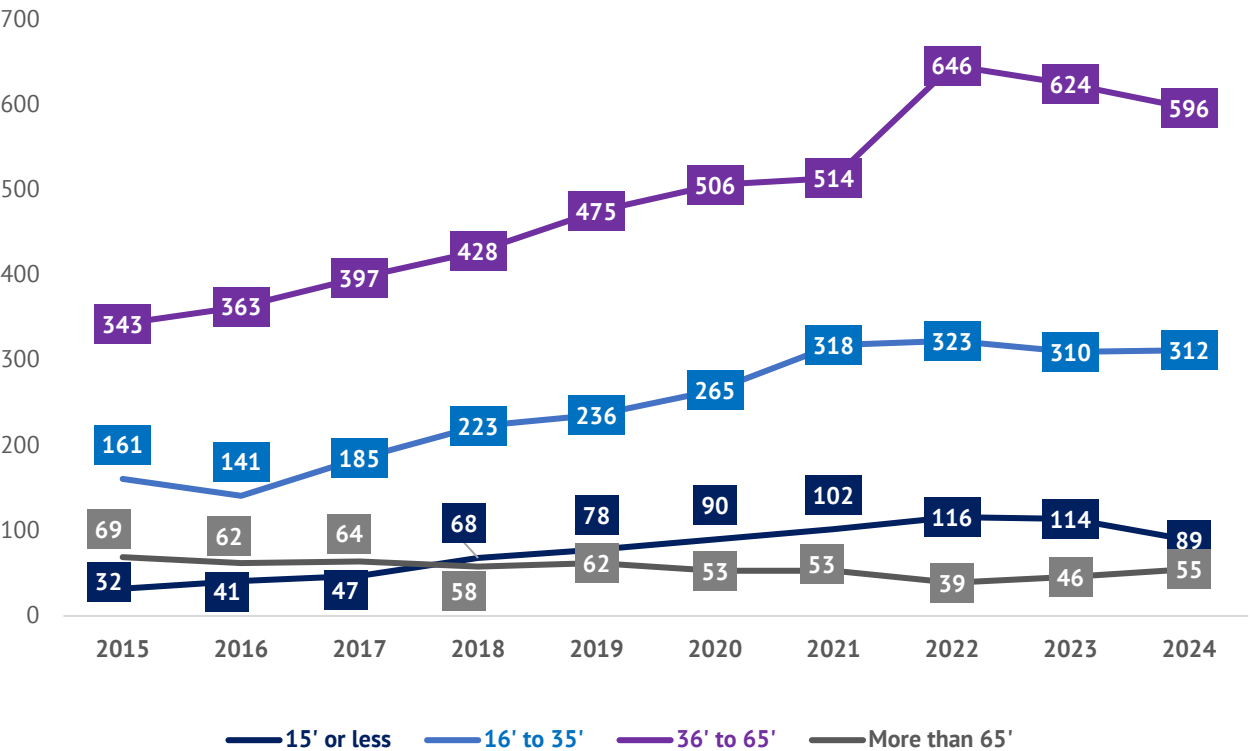
- The separation of the development of series hours from that of series seasons means the following:
- On the one hand, there is a lower number of episodes per season. On the other hand, episodes are shorter, probably to cope with production costs and inflation.

Series with 13-episodes-or-less-per-season: Average number of episodes per season and duration of episodes (2015-2024)



The episode duration of most TV series produced is longer than 16 minutes, typically 36 to 65 minutes.

Number of fiction titles by duration of episodes (excl. TV films and collections), 2015-2024

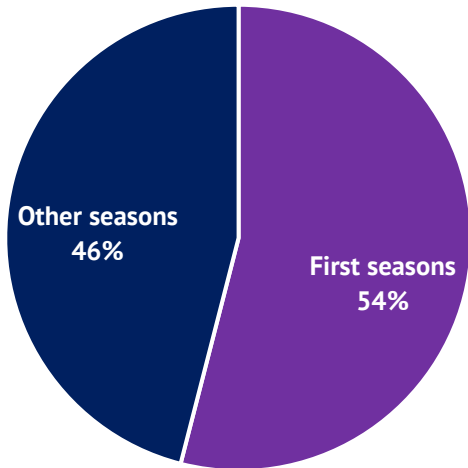


Source: European Audiovisual Observatory analysis of Media-press.tv data

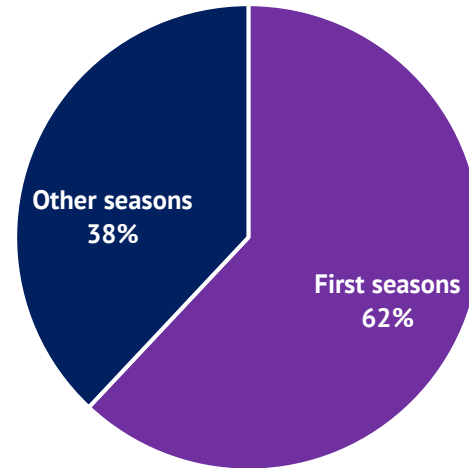
New series are crucial for the high-end TV market.

- On average, 62% of all series with three to 13 episodes per season produced are new projects.
- However, these figures include ‘mini-series’ that are designed to last only one season.

Share of first seasons among all series
(average 2015-2024)



Share of first seasons among series with 13-episodes-or-less-per-season (average 2015-2024)

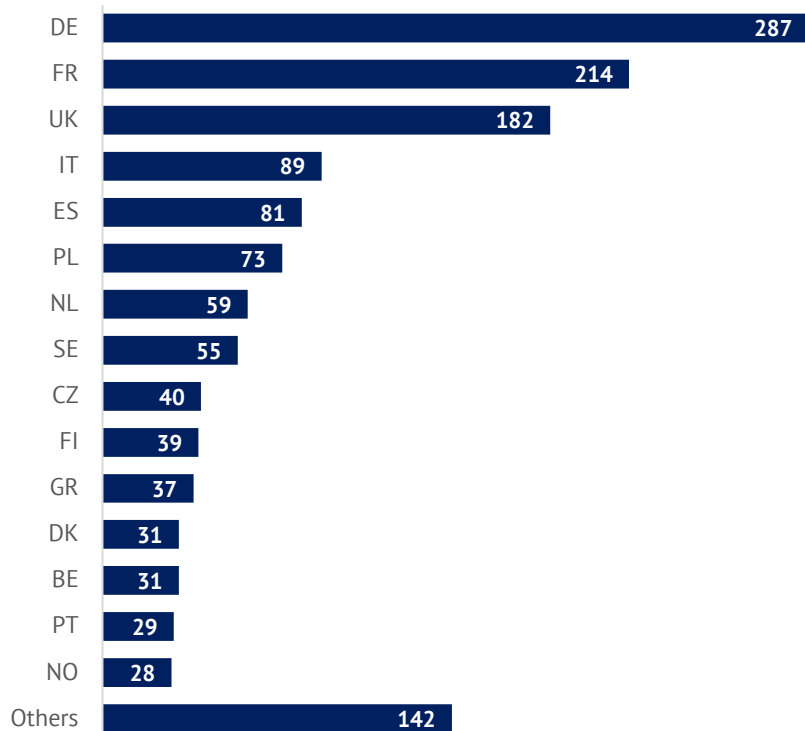


Origin of European audiovisual fiction

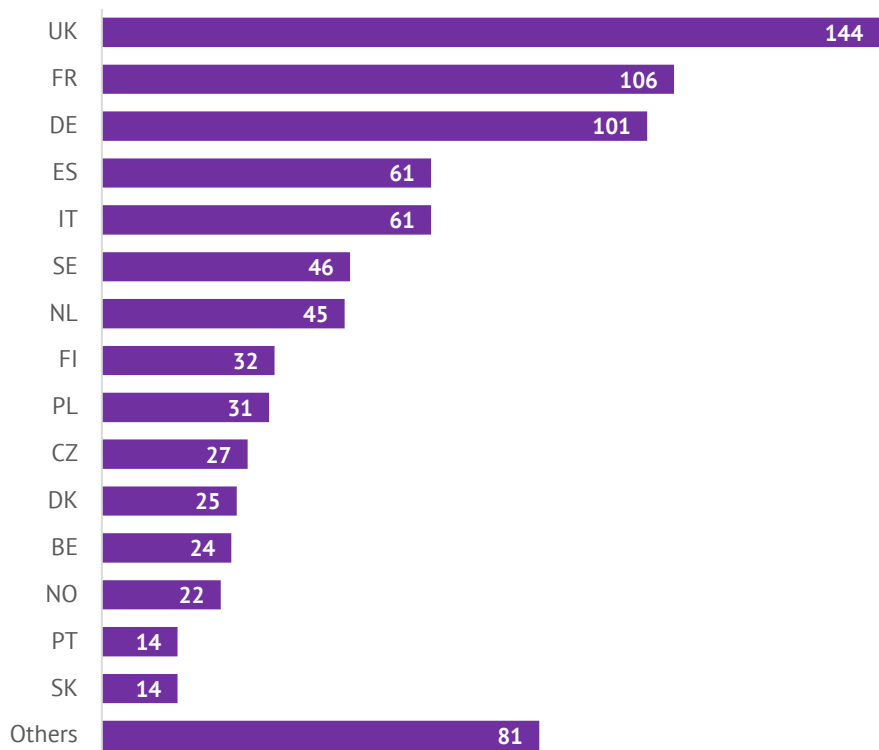
Germany is the leading country for fiction production in Europe in terms of the number of TV seasons and films produced.

- The United Kingdom is the leading producer of series with 13-episodes-or-less-per-season.
- In addition to the big five audiovisual markets, the Nordic countries are among the top producers.

**Top fiction-production countries
in number of TV films/seasons (2024)**



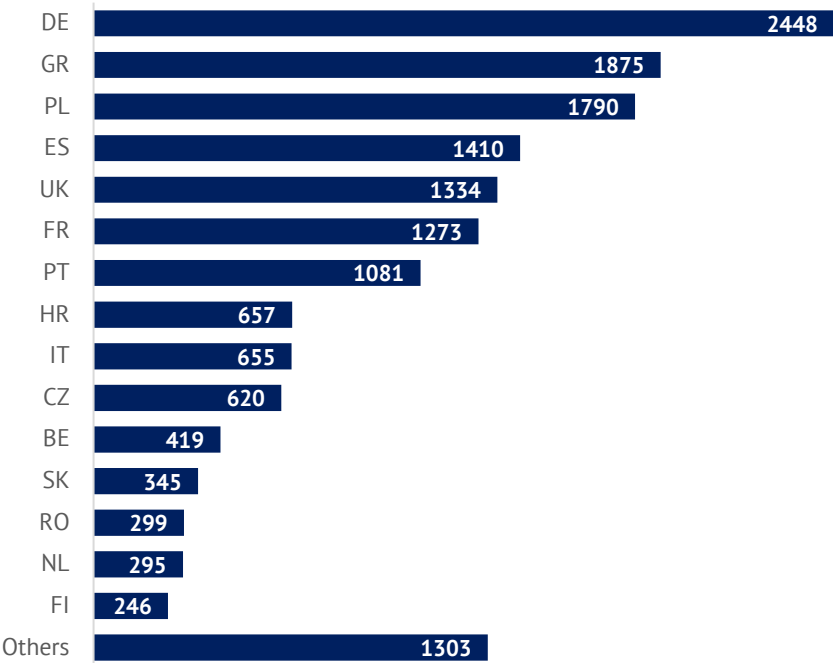
**Top series with 13-episodes-or-less-per-season-producing
countries in number of TV films/seasons (2024)**



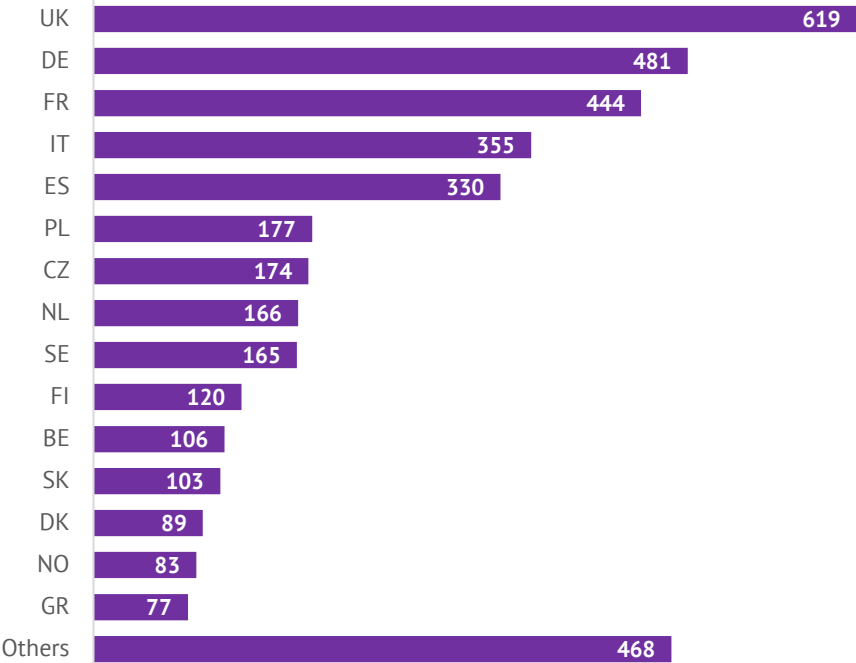
In terms of hours, Germany, Greece and Poland lead thanks to a strong production of daily soaps and telenovelas.

- Spain, the United Kingdom, France and Portugal are also major producers of telenovelas and daily soaps.
- The five biggest markets lead the production of series with 13-episodes-or-less-per-season.

Top fiction-producing countries
in number of hours (2024)



Top countries producing series with 13-episodes-or-less-per-season - in number of hours (2024)

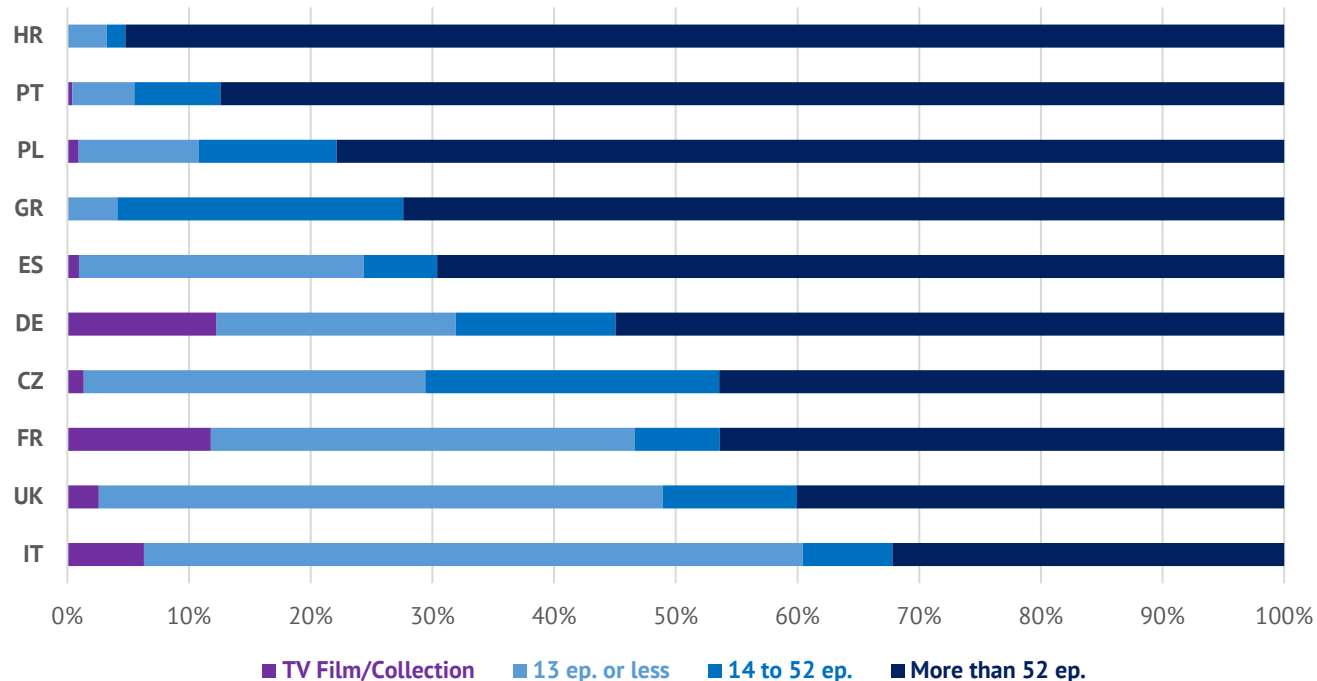


Source: European Audiovisual Observatory analysis of Media-press.tv data

The structure of the fiction production market varies between the leading countries.

- Croatia, Portugal, Poland, Greece and Spain, for example, have a strong tradition of long-running soaps.
- Germany, France and Italy, meanwhile, place a higher-than-average emphasis on TV films.
- Series with 13-episodes-or-less-per-season are significant in Italy, the United Kingdom and France.

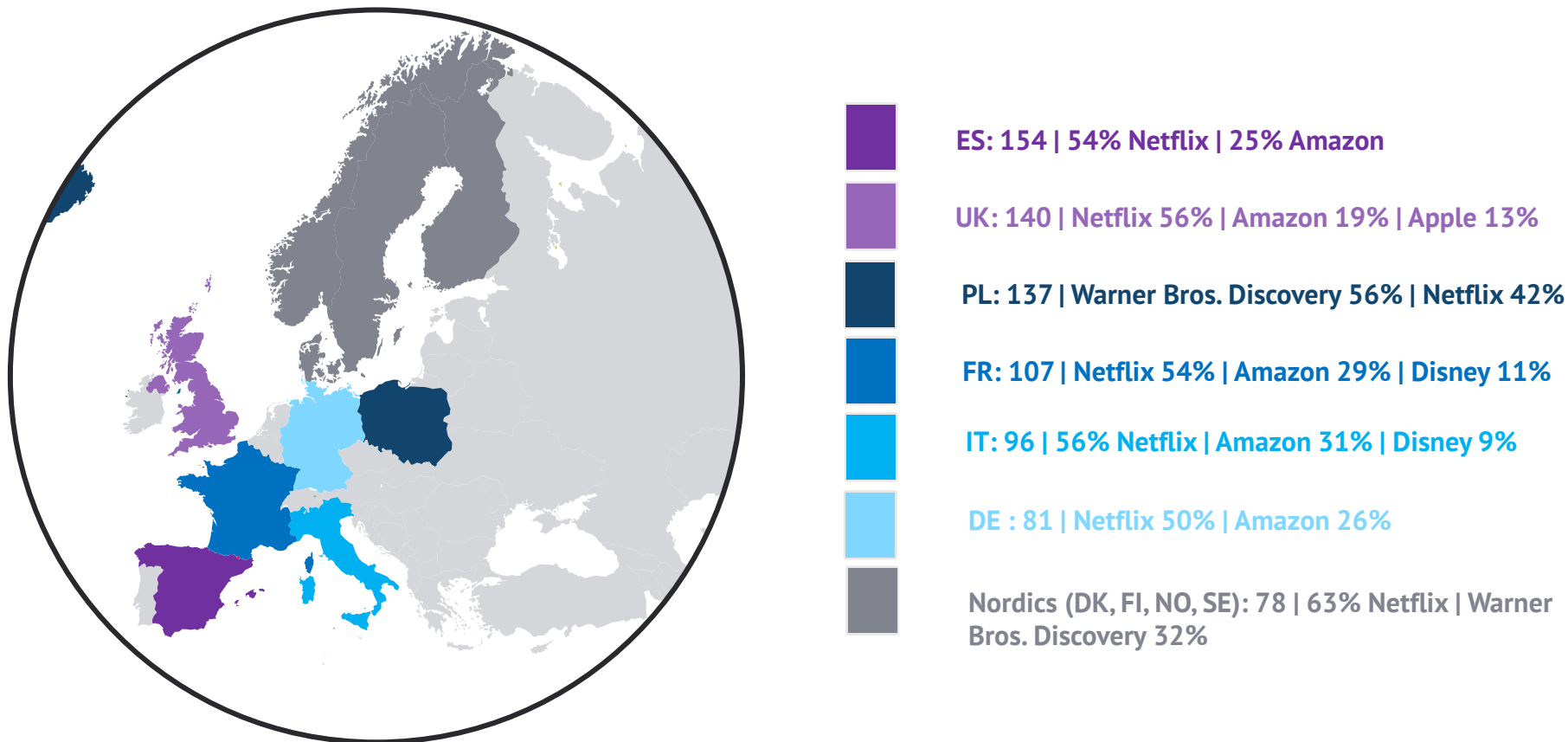
Hours of fiction produced by country and format (top 10 producing countries) in % (2024)



Global streamers have geographic preferences for production countries. The biggest markets benefit the most.

- Between 2015 and 2024, almost half (48%) of the TV fiction commissioned by streaming services was produced in just three countries. Spain (17%), the United Kingdom (16%) and Poland (15%) benefited the most from additional investment by streamers.

Map of production countries of fiction titles commissioned by global streamers (2020-2024)

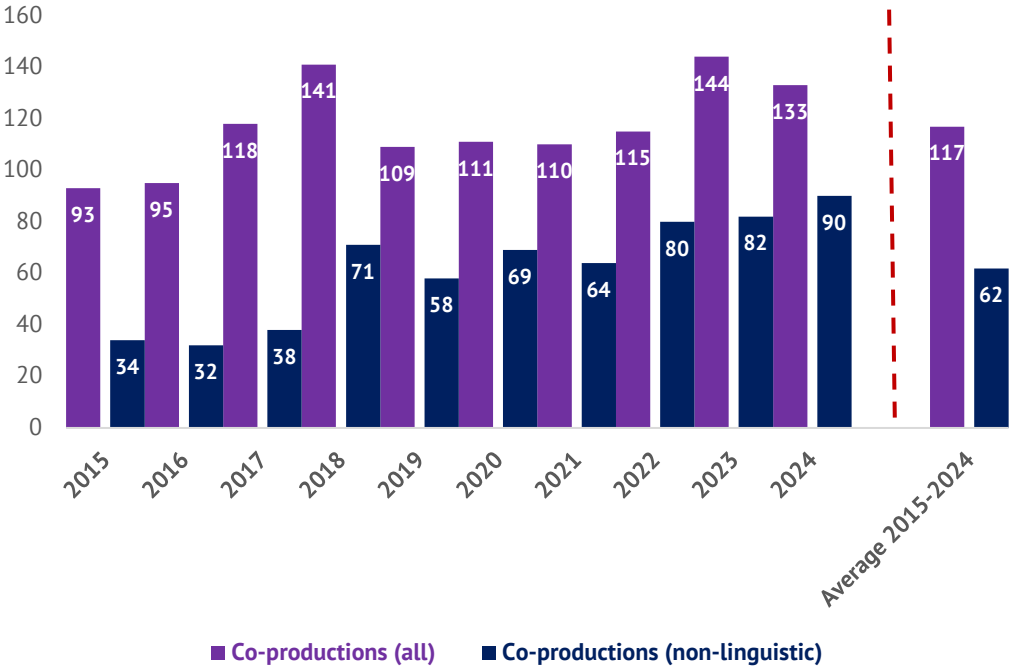


International co-productions

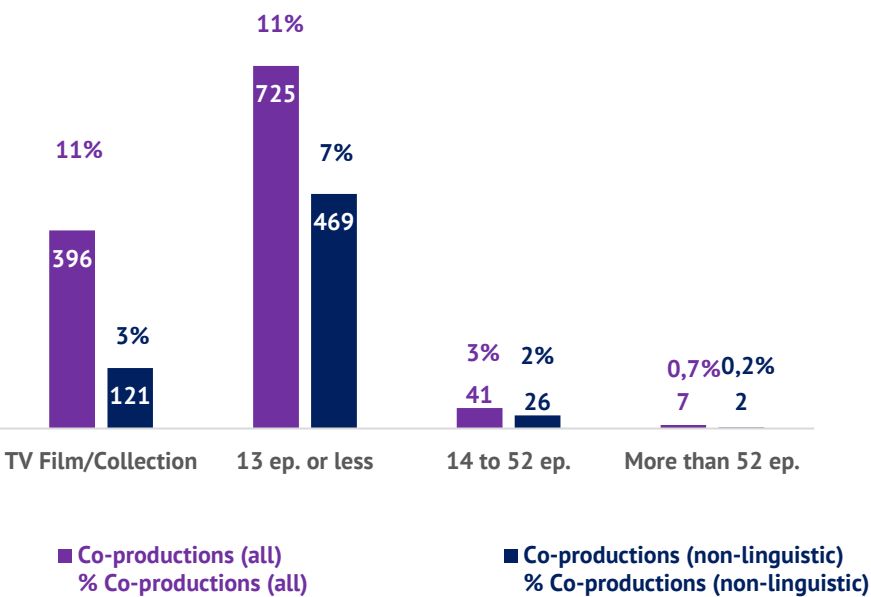
There are over 100 co-productions made each year, almost all of which are high-end TV series and TV films.

- In 2024, co-productions made up 9% of all TV fiction titles produced in Europe.
- Between 2015 and 2024, co-productions accounted for 11% of series with 13-episodes-or-less-per-season, and 7% when excluding ‘linguistic coproductions’ (co-productions between neighbouring countries sharing the same language).

Number of co-productions (2015-2024)



Number and share of co-productions by format (total 2015-2024)

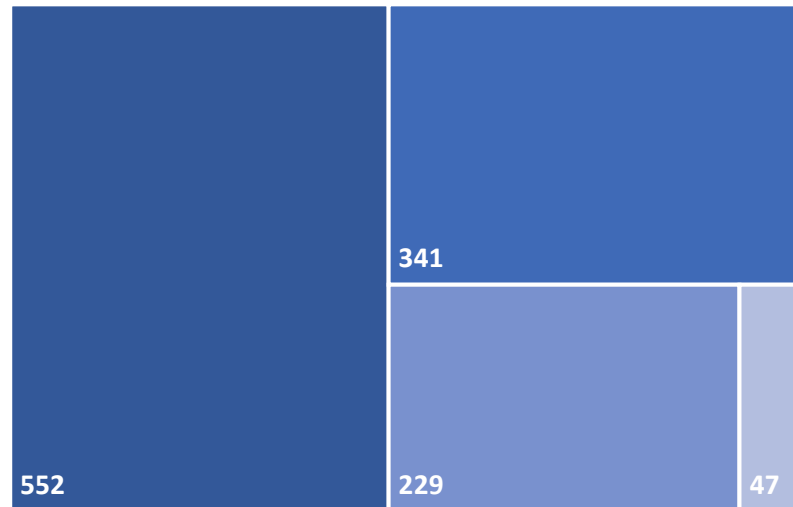


Source: European Audiovisual Observatory analysis of Media-press.tv data

Most non-linguistic co-productions only include European countries.

- However, around one in five also involves the United States and/or Canada, as well as at least one European country.
- Excluding the United States and Canada, there are few co-productions with non-European countries.

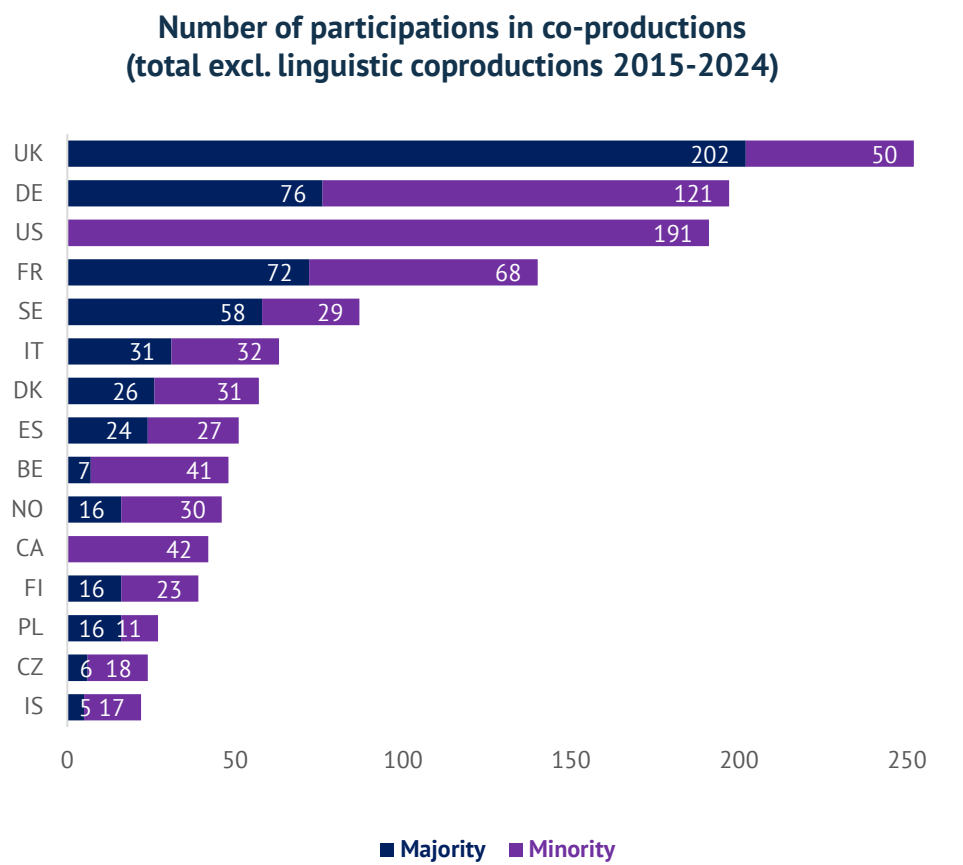
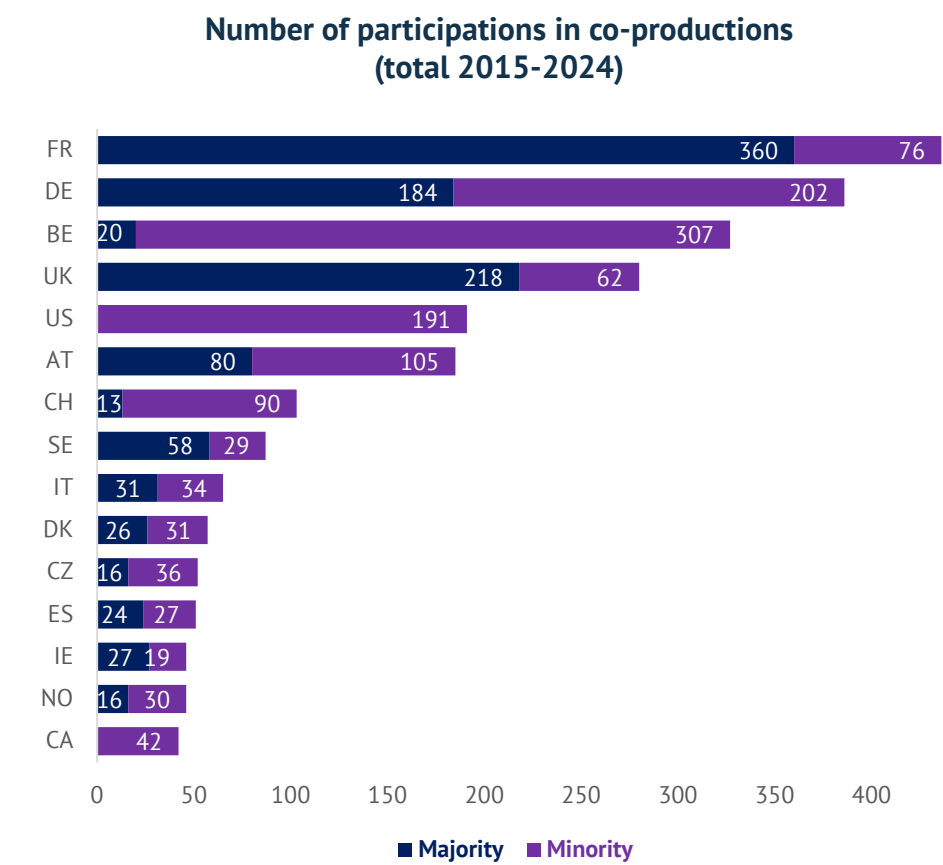
**Breakdown of co-productions by participating regions
(total 2015-2024)**



- European "linguistic" co-productions
- Only European countries (excl. "linguistic")
- Europe + USA and/or Canada
- Europe + other non-European countries and not USA or Canada

France, Germany and Belgium are involved in the largest number of co-productions.

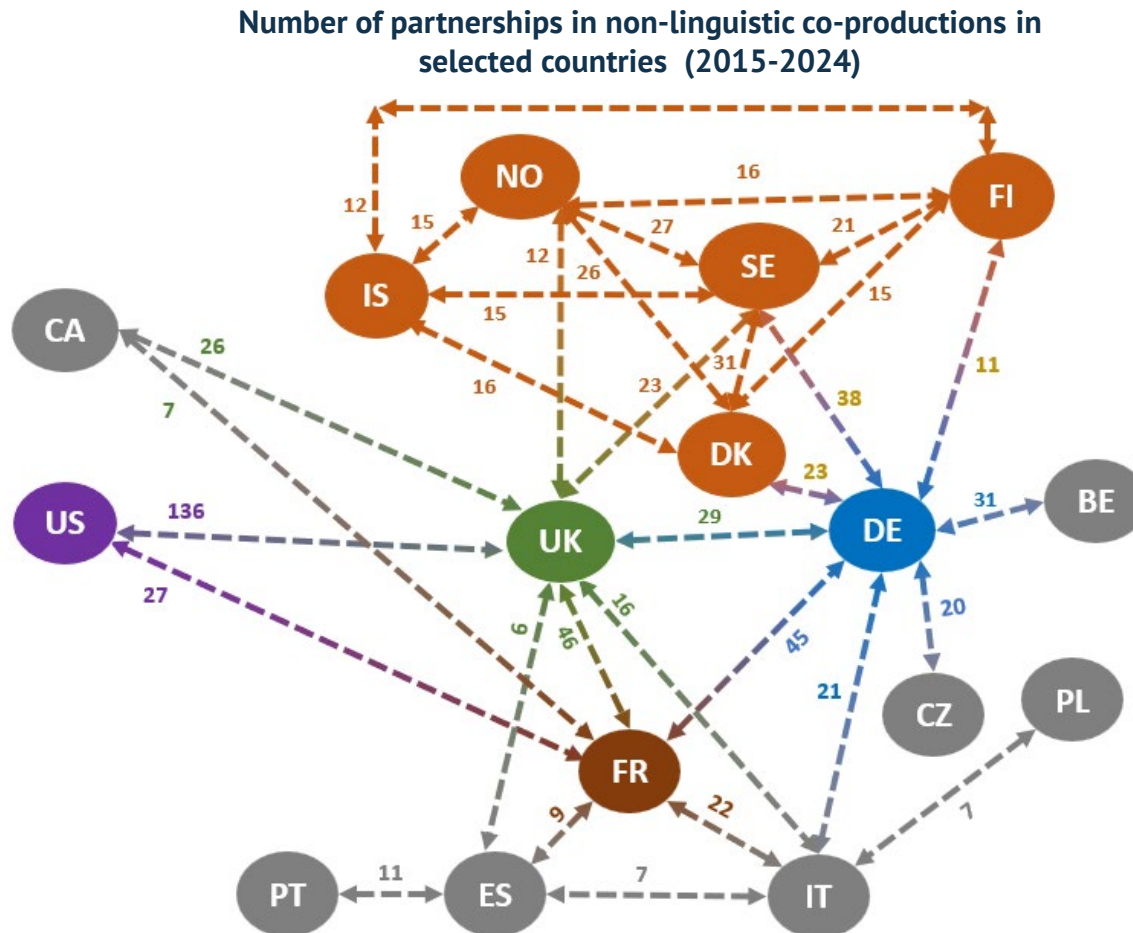
- Belgium's involvement is primarily as a minority co-producer, most frequently alongside France.
- However, when excluding co-productions between neighbouring countries that share the same language, the top five countries are the United Kingdom, Germany, the United States (as a minority co-producer), France and Sweden.



Source: European Audiovisual Observatory analysis of Media-press.tv data

The main co-production hubs are the Nordic countries, the United Kingdom, France and Germany.

- While the UK primarily co-produces with the US, it also co-produces significantly with other European countries.
- The Nordic countries frequently co-produce with each other, as well as with Germany and the United Kingdom.

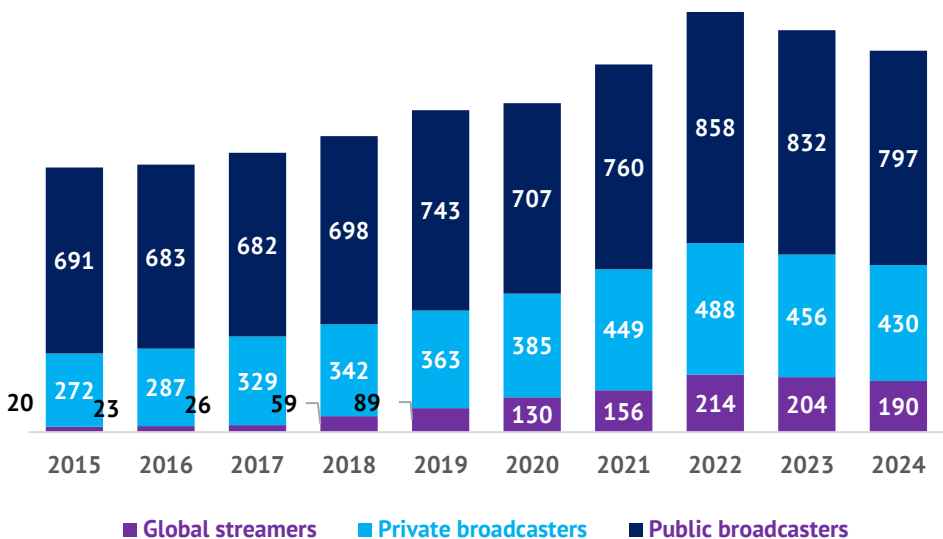


Please note that the number of partnerships differs from the number of projects. Denmark may have participated in the same projects as Iceland, Sweden and Norway.

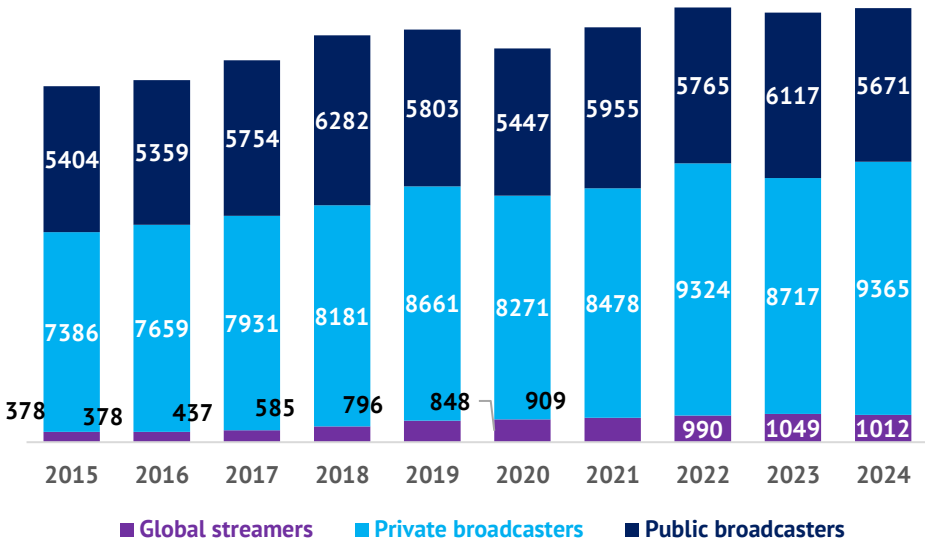
Commissioners of European audiovisual fiction

- In 2024, public service broadcasters were responsible for commissioning 56% of titles and 35% of hours produced.**
- By contrast, private broadcasters commissioned 30% of titles and 59% of hours. Private broadcasters tend to attribute a higher share of their commissions to daily soaps and telenovelas.
 - Global streamers accounted for 14% of titles, but 6% of hours, since they do not invest in long-form content.

Fiction titles commissioned by category of players (2015-2024)



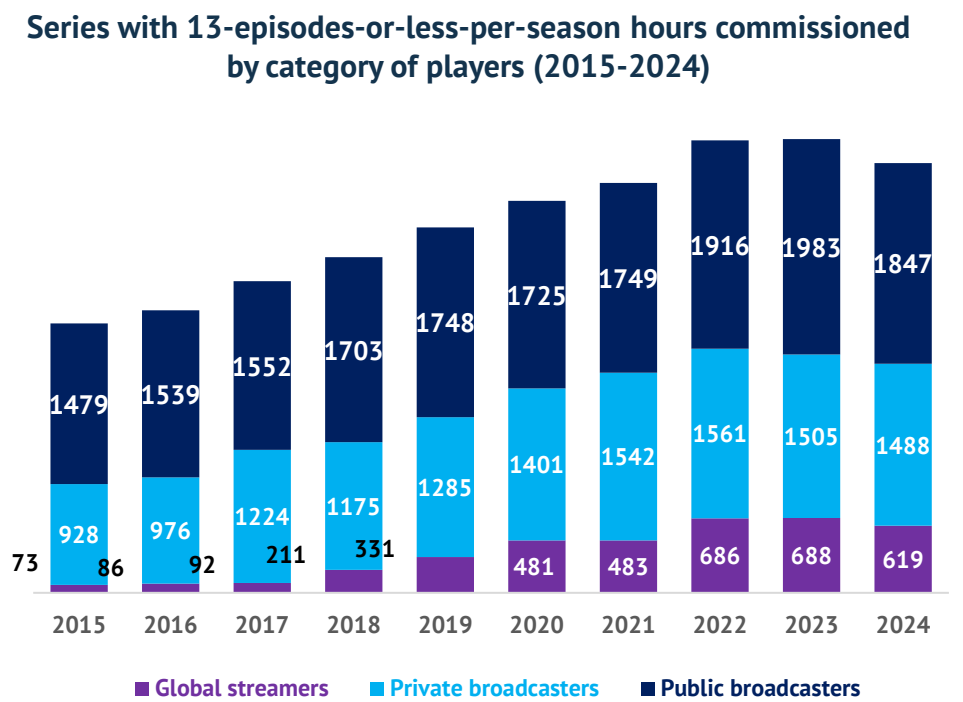
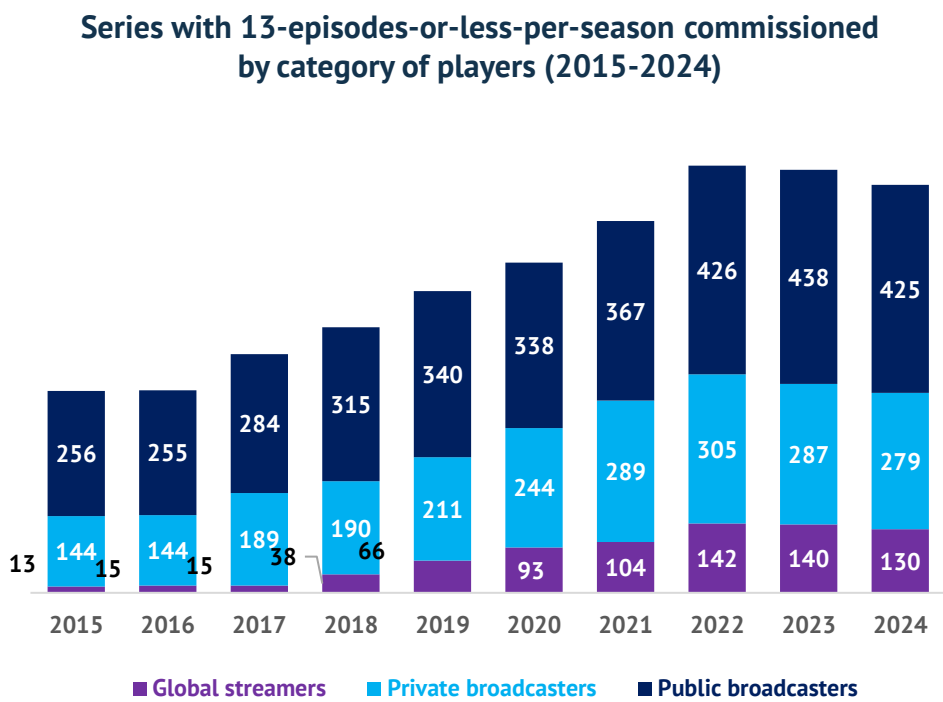
Fiction hours commissioned by category of players (2015-2024)



Source: European Audiovisual Observatory analysis of Media-press.tv data

In 2024, global streamers were responsible for 16% of commissioning of high-end TV series titles and hours.

- Public broadcasters commissioned 51% of titles of series with 13-episodes-or-less-per-season and 47% of hours.
- Private broadcasters commissioned 33% of high-end TV series titles and 38% or hours.



Source: European Audiovisual Observatory analysis of Media-press.tv data

In 2024, the top five groups accounted for 26% of high-end TV series commissions, while the top 20 accounted for 63%.

Top 20 commissioners of series with 13-episodes-or-less-per-season titles (2024)

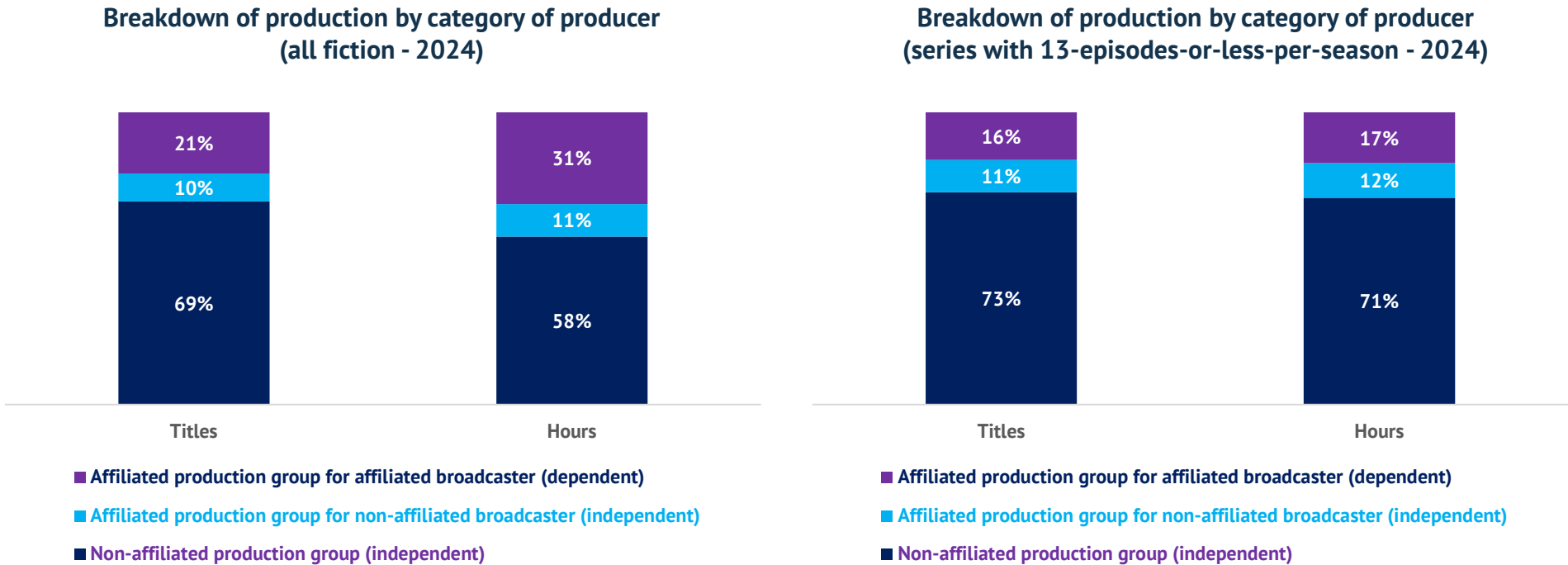
Rank	Group (country of origin)	#Titles
1	BBC (UK)	59
2	Netflix (US)	49
3	ARD (DE)	40
4	Amazon (US)	36
5	NPO (NL)	34
6	ZDF (DE)	30
7	RAI (IT)	28
8	Sveriges Television (SVT) Group (SE)	23
9	France Télévisions (FR)	21
10	Comcast (US)	21
11	RTL Group (LU) / Bertelsmann (DE)	20
12	SRG-SSR (CH)	20
13	RTBF (BE)	20
14	YLE (FI)	20
15	Paramount (US)	20
16	Warner Bros. Discovery (US)	19
17	PPF Group (CZ)	18
18	Groupe Canal Plus (FR)	17
19	Telia Company (SE)	17
20	ITV (UK)	17

Important note: these figures are indicative as each title is attributed to only one broadcaster, even in the case of co-productions involving several broadcasters.

Producers of European audiovisual fiction

In this section, ‘independent productions’ refers to: a) productions from groups that are not affiliated with a major broadcaster; and b) productions from groups that are affiliated with a major broadcaster, but which are produced for another broadcaster. Please note that control of IP rights is not taken into account.

- In 2024, independent productions accounted for the vast majority of titles. They had an even higher share among high-end TV series with 13-episodes-or-less-per-season.

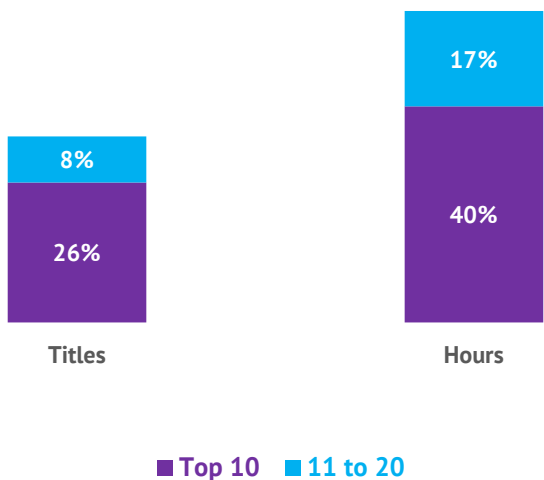


Source: European Audiovisual Observatory analysis of Media-press.tv data

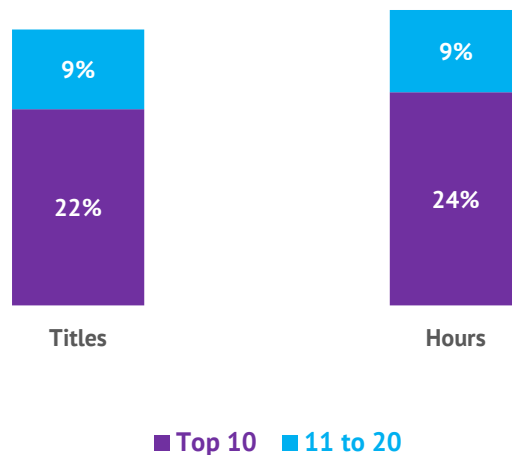
The top 20 producers account for 34% of titles and 57% of production hours.

- The concentration of hours is strongly influenced by the production of telenovelas and soaps (there are comparatively few titles, but each one comprises many hours).
- A similar pattern emerges for series with 13-episodes-or-less-per-season, with a concentration of 31% in terms of titles and 33% in terms of hours.

**Share of the top 20 producers out of total production
(All fiction, 2024)**



**Share of the top 20 producers out of total production
(Series with 13-episodes-or-less-per-season, 2024)**



The top producers of TV fiction titles in 2024 were the ARD, the RTL Group, the Banijay Group, the Mediawan-Leonine Alliance and the ZDF.

- The three main producers of independent TV fiction were the RTL Group, the Mediawan-Leonine Alliance and the Banijay Group.
- The Banijay Group, the RTL Group and ITV had the most geographically diverse selection of production countries.

Top 10 producers (2024) by...

Number of titles produced

Rank	Group	#Titles
1	ARD (DE)	86
2	RTL Group (LU)/ Bertelsmann (DE)	54
3	Banijay Group (FR)	40
4	Mediawan+Leonine/ Mediawan/KKR (FR)	40
5	ZDF (DE)	30
6	BBC (UK)	26
7	ITV (UK)	25
8	All3Media/ RedBird IMI (US/AE)	22
9	TF1/ Bouygues (FR)	21
10	Beta Film (DE)	13

Number of independent titles produced

Rank	Group	#Titles
1	RTL Group (LU) / Bertelsmann (DE)	44
2	Mediawan+Leonine / Mediawan/KKR (FR)	40
3	Banijay Group (FR)	40
4	All3Media/ RedBird IMI (US/AE)	22
5	Beta Film (DE)	20
6	ITV (UK)	17
7	TF1/Bouygues (FR)	16
8	Highlight Communications (CH)	14
9	Warner Bros. Discovery (US)	13
10	JLA Groupe (FR)	11

Number of different countries of production

Rank	Group	#Countries
1	Banijay Group (FR)	12
2	RTL Group (LU) / Bertelsmann (DE)	11
3	ITV (UK)	7
4	Warner Bros. Discovery (US)	7
5	Mediawan+Leonine / Mediawan/KKR (FR)	6
6	TF1/ Bouygues (FR)	5
7	Beta Film (DE)	5
8	Groupe Canal Plus (FR)	5
9	BBC (UK)	4
10	PPF Group (CZ)	4

List of tables and figures

Production volume and formats of European audiovisual fiction

<u>Volume of AV fiction produced in Europe (2015-2024)</u>	11
<u>Breakdown of fiction titles, episodes and hours produced (average 2015-2024)</u>	12
<u>Number of AV fiction titles produced by format (2015-2024)</u>	13
<u>Number of AV fiction hours produced by format (2015-2024)</u>	14
<u>Series with 13-episodes-or-less-per-season: average number of episodes per season and duration of episodes (2015-2024)</u>	15
<u>Number of fiction titles by duration of episodes (excl. TV films and collections), 2015-2024</u>	16
<u>Share of first seasons among all series (average 2015-2024)</u>	17
<u>Share of first seasons among series with 13-episodes-or-less-per-season (average 2015-2024)</u>	17

Origin of European audiovisual fiction

<u>Top fiction-production countries in number of TV films/seasons (2024)</u>	19
<u>Top series with 13-episodes-or-less-per-season-producing countries in number of TV films/seasons (2024)</u>	19
<u>Top fiction-producing countries in number of hours (2024)</u>	20
<u>Top countries producing series with 13-episodes-or-less-per-season - in number of hours (2024)</u>	20
<u>Hours of fiction produced by country and format (top 10 producing countries) in % (2024)</u>	21
<u>Map of production countries of fiction titles commissioned by global streamers (2024)</u>	22

International co-productions

Number of co-productions (2015-2024)	24
Number and share of co-productions by format (total 2015-2024)	24
Breakdown of co-productions by participating regions (total 2015-2024)	25
Number of participations in co-productions (total 2015-2024)	26
Number of participations in co-productions (total excl. linguistic coproductions 2015-2024)	26
Number of partnerships in non-linguistic co-productions in selected countries (2015-2024)	27

Commissioners of European fiction

Fiction titles commissioned by category of players (2015-2024)	29
Fiction hours commissioned by category of players (2015-2024)	29
Series with 13-episodes-or-less-per-season commissioned by category of players (2015-2024)	30
Series with 13-episodes-or-less-per-season hours commissioned by category of players (2015-2024)	30
Top 20 commissioners of series with 13-episodes-or-less-per-season titles (2024)	31

Producers of European audiovisual fiction

Breakdown of production by category of producer (all fiction - 2024)	33
Breakdown of production by category of producer (series with 13-episodes-or-less-per-season - 2024)	33
Share of the top 20 producers out of total production (all fiction, 2024)	34
Share of the top 20 producers out of total production (series with 13-episodes-or-less-per-season, 2024)	34
Top 10 producers (2024) by number of titles produced	35
Top 10 producers (2024) by number of independent titles produced	35
Top 10 producers (2024) by number of different countries of production	35

More information:
www.obs.coe.int
agnes.schneeberger@coe.int

