Sweden

Sweden: key data 2025

Population (m)	10.7
TV households (m)	4.2
Consumer spending on total video (€m)	1,001.8
Comparison with 2024	7.8%
Consumer spending on digital video and TV VoD (€m)	995.0
Comparison with 2024	8.9%
Consumer spending on physical video software (€m)	6.8
Comparison with 2024	-58.4%

Consumer spending on total video (€m) - Total Europe	44,140.6
Comparison with 2024	10.9%
Consumer spending on digital video and TV VoD (€m) - Total Europe	43,421.1
Comparison with 2024	11.6%
Consumer spending on physical video software (€m) - Total Europe	719.5
Comparison with 2024	-21.0%
Exchange rate EUR/SEK	11.10

Sweden key commentary

Online Distribution

Following years of disruption caused by the pandemic and resulting production delays in the US, the Swedish Home Entertainment market has entered a more stable phase during 2025. While overall market revenues show a slight decline compared to 2024, this development largely reflects a period of normalization rather than structural weakness. The market is increasingly characterized by more predictable release patterns and more balanced consumer behavior across platforms.

An improving international release slate has helped sustain consumer engagement, even though competition for attention remains intense. Early availability of titles on SVOD platforms continues to influence transactional performance, and growth dynamics are more moderate than in previous years. However, the coexistence between SVOD and transactional formats is increasingly managed through more refined and title-specific release strategies, supporting long-term market sustainability.

Local titles continue to play a vital role in Sweden. With international line-up of titles still stabilizing, domestic titles remain an important driver of relevance and engagement within the transactional ecosystem. It is worth noting that 2025 was a weaker year in terms of performance for Swedish titles, reflected in lower box office performance and consequently a reduced impact on the overall Home Entertainment category performance.

Premium releases are now a fully normalized element of the Swedish Home Entertainment market. In 2025, these releases were less experimental and more consistently positioned towards consumers. While the format does not offset broader market pressures on its own, it continues to generate incremental value and supports revenue optimization on select titles.

The online transactional market (TVOD and EST) remains a core business area, although growth has stabilized in line with overall market trends. A more stable release cadence, clearer consumer communication and increasingly reliable data have strengthened the underlying business logic. EST continues to benefit from consumer demand for early access, ownership, and repeat viewing across genres contributing to a resilient performance despite a slightly contracting market.

Catalogue titles continue to play a vital role in the digital market. Consumer spending on catalogue titles continues to show stable demand, providing a counterbalance to fluctuations in new release performance. The catalogue ensures that the online transactional market retains its role as a comprehensive destination for a broad range of titles, complementing rather than competing with SVOD services.

Market insights continue to improve through the maturing use of the GfK Sales Tracker across the Nordic markets.

With validated datasets increasingly embedded in 2025 reporting, market insights have become more robust and actionable. Alignment with OMDIA reporting has improved further, supporting data-driven decision-making even in a more moderately declining market environment.

In 2024, the GfK Sales Tracker was launched for the Nordic market, including Sweden. With new and validated data now integrated, we are delivering significantly more accurate and reliable market figures. This enhanced market understanding has supported OMDIA's reporting, which has required some data adjustments, and more may be needed as market coverage expands. This evolving accuracy enables better-informed actions and a clearer view of emerging trends.

Physical Market

The Swedish physical market has continued its long-term structural transition. Overall revenues remain under pressure, with DVD in continued decline and Blu-ray showing relative stability. The 4K Ultra HD format continues to grow and further reinforces its position as a premium, collector-driven segment, although this growth does not fully compensate for declines in the other formats.

The physical market is increasingly defined by a focused and committed consumer base, with premium editions, strong catalogue titles and event-driven releases at the core of demand. The retail landscape in Sweden has remained largely stable during 2025, and despite lower volumes, the physical format continues to play a clearly defined and sustainable role within the broader home entertainment portfolio.

Other Relevant Developments

Following the publication of the Swedish Film Inquiry's final report in early 2025, discussions regarding proposed reforms to strengthen the film sector have continued throughout the year. In June 2026, the Government presented a new film policy bill, proposing new national objectives with a stronger focus on audiences, commercial reach and increased interaction between public and private financing. The production incentive scheme has also been reformed, with a new allocation model introduced and responsibility transferring to the Swedish Film Institute from 2027. However, the proposed film fund, reduced VAT on cinema admissions and levy on streaming services will not be implemented in their proposed form at this stage. A new inquiry has instead been appointed to develop a broader financing structure for the film sector, with its report due in February 2027.

Illegal IPTV services and digital piracy have remained key issues in the Swedish market during 2025. Increased political attention and industry cooperation have resulted in several proposed measures to strengthen enforcement against illegal streaming services. A parallel government inquiry on illegal IPTV has proposed updated legislation making the framework technology-neutral, stronger penalties for commercial copyright offences, and expanded responsibilities for relevant authorities, including the Police, Tax Agency, Intellectual Property Office and Post & Telecom Authority. The inquiry also proposes measures such as blocking illegal services, removing illegal search results, and enabling "live blocking" of illegal streams during ongoing events. During the year, several legal proceedings relating to illegal IPTV operations have continued in Swedish courts. Following public consultation, the proposals remain under consideration by the Government before further legislative action.

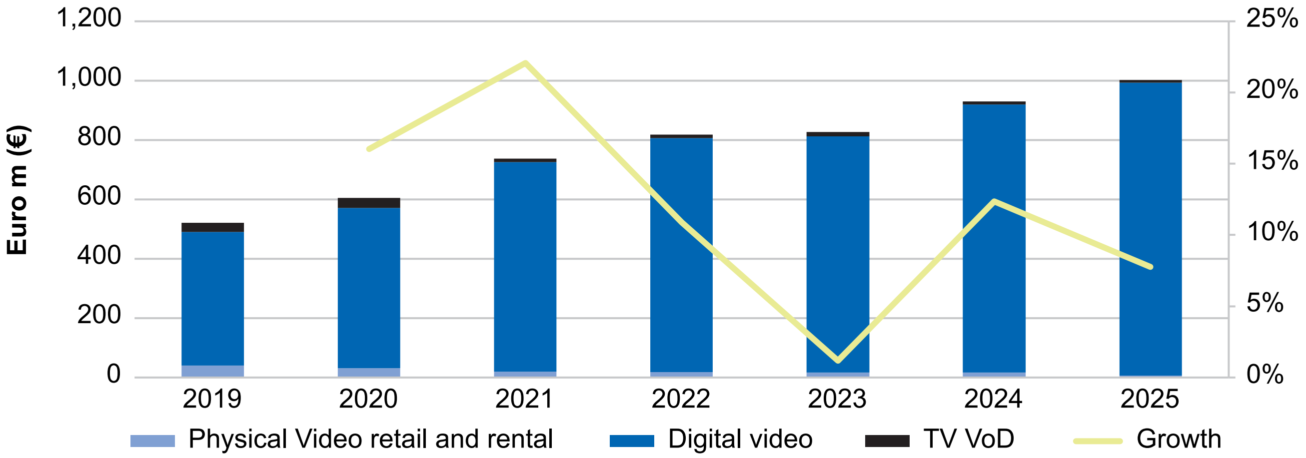
This commentary was provided by home entertainment right holders in the Swedish market.

Video market: Sweden

	2019	2020	2021	2022	2023	2024	2025	24/25
GENERAL								
Population (m)	10.3	10.4	10.4	10.5	10.6	10.6	10.7	0.5%
TV households (m)	4.1	4.1	4.1	4.1	4.2	4.2	4.2	0.2%
Population Total Europe (m)	638.1	638.8	638.7	640.6	642.5	642.2	640.9	-0.2%
TV households Total Europe (m)	258.5	259.6	259.4	260.4	262.9	264.1	264.5	0.2%
Broadband households (m)	3.7	3.8	3.8	3.9	4.0	4.1	4.2	2.5%
Nominal GDP (EUR m)	474.9	469.6	495.7	514.7	530.1	547.3	566.3	3.5%
Consumer price index (100 in 2010)	95.1	97.5	102.5	105.3	111.4	117.9	122.4	3.9%
Exchange rate EUR/SEK (SEK)	10.59	10.52	10.14	10.65	*11.47*	11.44	11.10	-3.0%
DVD Video player/recorder penetration (%)	81.8	79.5	77.3	75.1	72.8	70.8	68.2	-3.8%
Blu-ray Disc player/recorders penetration (%)	21.3	20.6	20.2	19.8	19.3	19.1	18.7	-1.8%
DVD Video player/recorder Total Europe (%)	60.9	58.7	56.8	54.8	52.6	50.9	48.8	-4.1%
Blu-ray Disc player/recorders penetration Total Europe (%)	22.3	21.6	21.0	20.2	19.4	18.7	18.2	-3.1%
OTT Subscriptions (m)	5.1	6.6	8.6	9.7	9.9	9.7	10.0	3.7%

 Source: Omdia

Consumer spending by segment



Total video software market

	2019	2020	2021	2022	2023	2024	2025	24/25
CONSUMER LEVEL ALL VIDEO								
Total market figures include consumption of both physical and digital video								
Total spending on video (SEK m)	5,513.4	6,357.6	7,480.9	8,706.5	9,487.8	10,633.9	11,118.5	4.6%
Total spending on video (EUR m)	520.8	604.2	737.6	817.9	827.4	929.8	1,001.8	7.7%
Growth (%)		16.0%	22.1%	10.9%	1.2%	12.4%	7.7%	
Total spending on video Total Europe (EUR m)	18,853.0	23,414.9	27,741.7	30,349.1	34,724.6	39,808.0	44,140.6	10.9%
CONSUMER LEVEL DIGITAL VIDEO (OTT) – TOTAL SPENDING								
The purchase or rental of films and TV series delivered over the open internet. Digital retail numbers include purchase on content on pay TV set-top-boxes where applicable. This category specifically excludes sports, live events and adult content to ensure it is comparable to physical video data.								
Retail digital video (SEK m)	275.0	307.9	196.5	223.7	251.4	229.2	221.0	-3.6%
Retail digital video (EUR m)	26.0	29.3	19.4	21.0	21.9	20.0	19.9	-0.6%
Rental digital video (SEK m)	438.9	516.9	342.2	361.6	306.1	277.9	288.2	3.7%
Rental digital video (EUR m)	41.5	49.1	33.7	34.0	26.7	24.3	26.0	6.9%
Subscription digital video (SEK m)	4,048.8	4,859.5	6,623.0	7,795.6	8,552.1	9,824.0	10,438.3	6.3%
Subscription digital video (EUR m)	382.4	461.8	653.0	732.3	745.8	859.0	940.5	9.5%
Total digital video (SEK m)	4,762.7	5,684.3	7,161.7	8,380.9	9,109.6	10,331.2	10,947.5	6.0%
Total digital video (EUR m)	449.8	540.2	706.1	787.3	794.5	903.3	986.4	9.2%
Total digital video Total Europe (EUR m)	10,175.6	14,909.5	19,222.1	22,207.7	25,569.0	29,782.9	35,048.7	17.7%
CONSUMER LEVEL PAY TV TRANSACTIONAL VOD – TOTAL SPENDING								
The rental of film and TV content on a transactional (VoD, NVoD/PPV) basis via cable/satellite/IPTV services, only on set-top-boxes. This category specifically excludes sports, live events and adult content to ensure it is comparable to physical video data.								
Pay TV TVOD (SEK m)	331.5	348.2	120.5	129.1	183.1	115.8	95.7	-17.4%
Pay TV TVOD (EUR m)	31.3	33.1	11.9	12.1	16.0	10.1	8.6	-14.9%
Pay TV TVOD Total Europe (EUR m)	6,345.9	6,722.3	7,155.8	6,975.4	8,137.7	9,114.4	8,372.4	-8.1%
CONSUMER LEVEL PHYSICAL VIDEO – TOTAL SPENDING								
Total market figures include consumption of legacy formats not broken out separately (eg, VHS, HD-DVD, UMD) where relevant.								
Physical video rental (SEK m)	57.0	24.8	3.5	1.6	0.6	0.2	0.1	-63.1%
Physical video rental (EUR m)	5.4	2.4	0.3	0.1	0.1	0.0	0.0	-62.0%
Physical video rental Total Europe (EUR m)	109.5	66.9	43.3	30.1	21.8	16.2	11.6	-28.6%
Physical video retail (SEK m)	362.3	300.2	195.1	194.9	194.4	186.6	75.3	-59.7%
Physical video retail (EUR m)	34.2	28.5	19.2	18.3	17.0	16.3	6.8	-58.4%
Physical video retail Total Europe (EUR m)	2,222.0	1,716.2	1,320.5	1,135.9	996.1	894.4	707.9	-20.8%
Physical video software (SEK m)	419.3	325.0	198.6	196.5	195.1	186.9	75.4	-59.7%
Physical video software (EUR m)	39.6	30.9	19.6	18.5	17.0	16.3	6.8	-58.4%
Physical video software Total Europe (EUR m)	2,331.5	1,783.1	1,363.8	1,166.0	1,017.9	910.6	719.5	-21.0%

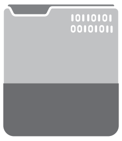
*Notes: **1)** Consumer level digital video (OTT) and pay TV transactional VOD figures may differ from locally published figures due to the application of different definitions. **2)** Historical numbers in this section may differ from those published in previous years owing to changes in Omdia methodology, updated data sources and other data restatements. **3)** The current online figures are a snapshot of the market in June 2026. Figures are updated regularly and so it may not possible to compare directly to figures published after this date. **4)** Total Europe include Austria, Belgium, Denmark, Finland, France, Germany, Greece, Iceland, Ireland, Italy, Netherlands, Norway, Portugal, Spain, Sweden, Switzerland, UK, Croatia, Czech Republic, Hungary, Poland, Russia, and Slovakia. **5)** OTT Subscriptions are subscriptions to online channels and virtual pay TV operators. Figures exclude multiscreen services of pay TV operators.*

Source: Omdia

Key players in the market (in alphabetical order)

Physical	Digital	
CDON	Amazon Prime	SF Anytime B2C
Ginza	iTunes	Viaplay
	SF Anytime B2B	

Share of European market 2025



Digital video (OTT)
2.8%

Pay TV TVOD
0.1%

Physical retail
0.1%

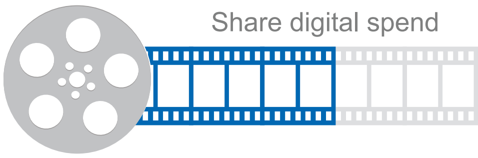
Physical rental
1.0%

Average home entertainment spending

Spending per TV household (EURO)
€240.1

Spending per broadband household (EURO)
€241.2

Digital share of spend vs. broadband speed



Share digital spend
98%

Broadband subscriptions speed rank
(ranked across the 9 IVF countries)*

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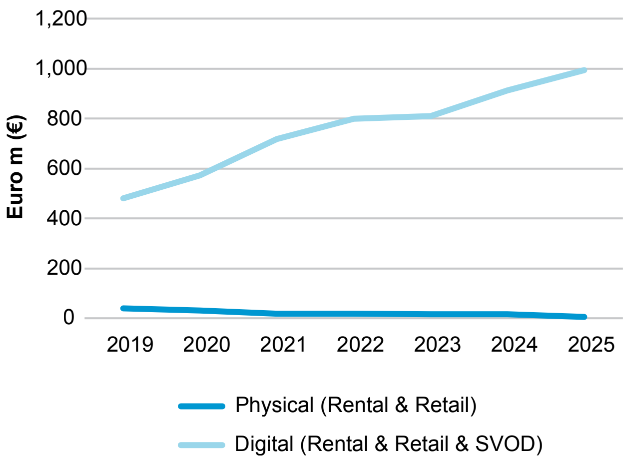
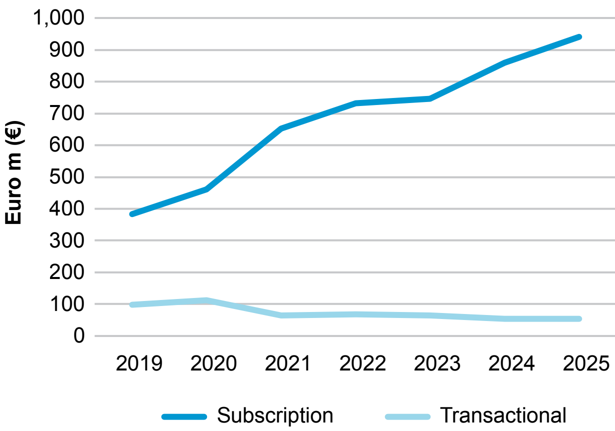
Comparison Physical vs Digital



Comparison Subscription vs Transactional



Note: Digital (Rental & Retail) includes SVOD data; Transactional excludes physical.
*Countries are ranked based on the proportion of broadband subscriptions receiving fixed data at speed over 30Mbps.

Source: Omdia