Germany

Germany: key data 2025

Population (m)	84.1
TV households (m)	40.6
Consumer spending on total video (€m)	6,796.7
Comparison with 2024	8.6%
Consumer spending on digital video and TV VoD (€m)	6,622.0
Comparison with 2024	10.7%
Consumer spending on physical video software (€m)	174.7
Comparison with 2024	-36.5%

Consumer spending on total video (€m) - Total Europe	35,795.1
Comparison with 2024	13.3%
Consumer spending on digital video and TV VoD (€m) - Total Europe	35,075.6
Comparison with 2024	14.4%
Consumer spending on physical video software (€m) - Total Europe	719.5
Comparison with 2024	-21.0%

Germany key commentary

Market developments

In 2025, the German home entertainment market (physical and digital, including SVOD) grew by 2% to EUR 3.73 billion in consumer spending, according to the annual market study published by the German Federal Film Board (FFA). This was another record year, but growth has clearly slowed after several strong years.

SVOD remained by far the largest segment, passing EUR 3 billion for the first time at EUR 3.04 billion, up 4% on 2024 and accounting for 81% of the market. The slowdown is notable: SVOD grew by 11% in 2024 and by 4% in 2025, which suggests the segment is maturing rather than still expanding rapidly.

Transactional digital formats were stable. EST and TVOD together reached EUR 475 million, a 1% increase on 2024 and a 13% market share. EST slipped by 2% to EUR 283 million, although unit sales rose by 8% as average prices fell by 10% to EUR 8.79. TVOD grew by 4% to EUR 192 million, driven entirely by pricing, with the average rental price up 12% to EUR 3.50. Transactional exploitation therefore still shows pricing power, but it is no longer growing in volume.

The physical market declined by 19% to EUR 218 million and now represents just under 6% of home entertainment spending. Within that segment, 2025 marked a turning point: Blu-ray, at EUR 113 million, overtook DVD, at EUR 105 million, for the first time. What is left of the physical market is increasingly a premium and collector segment rather than a mass market.

Reach continued to grow. 31.5 million people in Germany bought or rented physical or digital video or subscribed to a streaming service in 2025, equal to 42% of the population aged 10 and over, spending an average of EUR 118.64 each. These figures are not directly comparable with previous editions: from the 2025 report onwards, the FFA study is based on all residents of Germany aged 10 and over (75.5 million), applied retrospectively to 2019.

The audience for transactional formats continues to age. The average age of buyers in the transactional market has risen to 43.4 years, while SVOD users average 40.7 years. Younger audiences are moving to subscription consumption, which is a structural concern for the exploitation chain.

The wider economic environment remained subdued. Growth was weak and consumers stayed price-sensitive, but home entertainment benefited from its position as an affordable at-home leisure category. Taken together with cinema, which generated EUR 921 million in 2025, the combined German cinema and home entertainment market reached a record EUR 4.65 billion.

Compared with the pre-pandemic year 2019, consumer spending on home entertainment in Germany has grown by around two thirds. SVOD has more than doubled, transactional digital formats have grown moderately, and physical formats have lost roughly 70% of their volume.

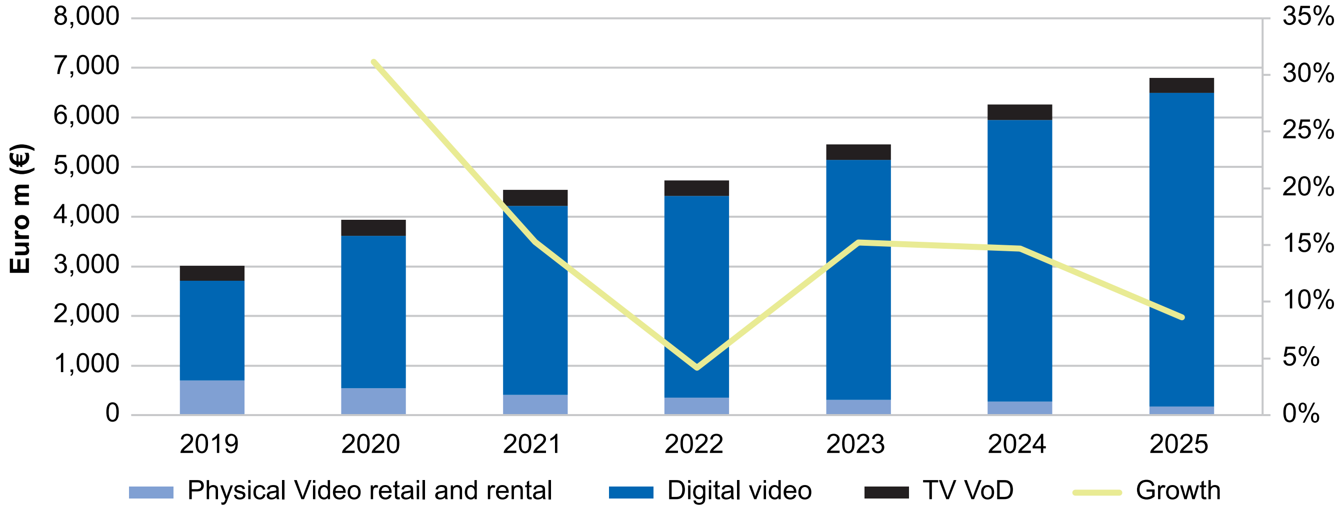
According to GfK Entertainment's 2025 year-end charts, "Die Schule der magischen Tiere 3" topped the DVD ranking and was also the strongest local title, while the Blu-ray ranking was led by "Jurassic World: Die Wiedergeburt."

This commentary was provided by the AllScreens, the German Theatrical Distribution and Video Association.

Video market: Germany

	2019	2020	2021	2022	2023	2024	2025	24/25
GENERAL								
Population (m)	83.6	83.6	83.7	84.1	84.5	84.6	84.1	-0.6%
TV households (m)	39.9	40.2	40.0	40.2	40.5	40.7	40.6	-0.1%
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)	32.0	32.9	33.5	34.2	34.5	34.8	35.1	0.8%
Nominal GDP (EUR m)	3,454.7	3,319.2	3,458.2	3,630.6	3,745.5	3,862.0	3,975.5	2.9%
Consumer price index (100 in 2010)	106.5	108.3	112.0	114.6	120.4	126.4	130.4	3.1%
DVD Video player/recorder penetration (%)	43.7	41.1	39.2	37.3	35.7	34.3	32.7	-4.6%
Blu-ray Disc player/recorders penetration (%)	23.3	22.1	21.1	20.0	19.0	18.4	17.7	-3.3%
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)	26.0	37.5	43.3	47.8	52.6	55.7	57.9	3.9%

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 (EUR m)	3,006.6	3,943.4	4,546.3	4,736.2	5,457.2	6,257.9	6,796.7	8.6%
Growth (%)		31.2%	15.3%	4.2%	15.2%	14.7%	8.6%	
Total spending on video Total Europe (EUR m)	13,405.6	17,667.2	21,515.8	24,335.6	27,508.5	31,585.1	35,795.1	13.3%
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 of 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 (EUR m)	239.6	285.4	268.1	269.5	293.2	299.8	306.2	2.1%
Rental digital video (EUR m)	149.8	209.0	216.3	188.9	191.5	196.9	201.5	2.3%
Subscription digital video (EUR m)	1,620.0	2,566.1	3,317.5	3,608.6	4,346.7	5,178.9	5,807.5	12.1%
Total digital video (EUR m)	2,009.4	3,060.4	3,801.9	4,066.9	4,831.4	5,675.6	6,315.3	11.3%
Total digital video Total Europe (EUR m)	10,076.6	14,819.3	19,145.8	22,142.9	25,526.7	29,730.0	34,129.7	14.8%
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 (EUR m)	296.8	334.7	330.9	320.7	314.1	307.1	306.7	-0.1%
Pay TV TVOD Total Europe (EUR m)	997.4	1,064.8	1,006.2	1,026.7	963.9	944.5	945.9	0.1%
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 (EUR m)	42.1	26.4	13.7	9.0	5.9	3.9	2.4	-37.6%
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 (EUR m)	658.3	521.9	399.7	339.5	305.9	271.3	172.2	-36.5%
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 (EUR m)	700.4	548.3	413.5	348.5	311.8	275.2	174.7	-36.5%
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.*
***6)** Subscription digital video figures are according to Omdia and may differ from BVV's other sources.*

Source: Omdia

Key players in the market (in alphabetical order)

Physical	Digital	SVOD
Amazon	Amazon	Amazon
Expert	Apple	Netflix
Media Markt/ Saturn	Maxdome	Disney+
Müller Drugstores	Google Play	WOW (Sky)
Saturn	Sky Store	Apple TV+
Thalia		

Share of European market 2025

Digital video (OTT)
18.5%

Pay TV TVOD
32.4%

Physical retail
21.1%

Physical rental
24.3%

Average home entertainment spending

Spending per TV household (EURO)
€167.4

Spending per broadband household (EURO)
€193.9

Digital share of spend vs. broadband speed

Share digital spend
93%

Broadband subscriptions speed rank
(ranked across the 9 IVF countries)*
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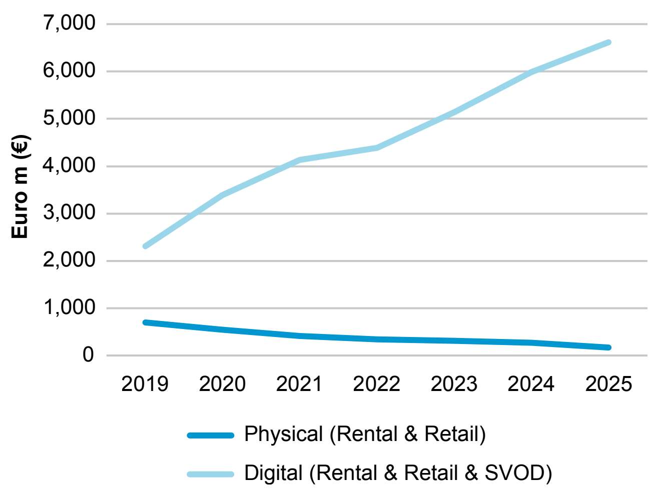
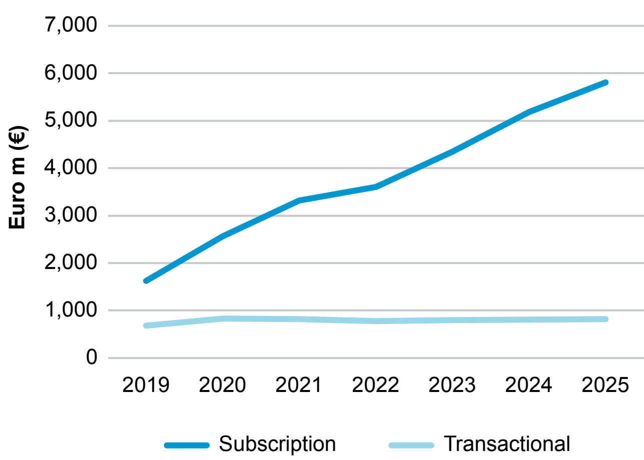
Comparison Physical vs Digital



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