

ifpi making music thrive

EMBARGO UNTIL 5PM CEST MONDAY 22nd SEPTEMBER 2025

MUSIC IN THE EU 2025



A GROWTH ENGINE

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INTRODUCTION

Europe is a powerhouse of musical creativity and cultural diversity

The European Union (EU) has long been a global leader in music, home to an extraordinarily diverse range of talented artists from across the region, who champion and celebrate a huge breadth of genres and cultures.

The EU's positive music environment is the result of years of investment, hard work, and a passion for developing talent. Record labels are at the heart of this work - investing in new artists, nurturing growth, and showcasing music across Europe and on the global stage. This commitment has created an ecosystem in which both culture and local economies can flourish.

Consumer engagement with music on paid streaming services has driven much of this growth, with labels actively pushing the boundaries of geography and culture to help connect great music with new audiences, stretching from local communities to fans across the globe.

One thing that stands out about European music is the sheer diversity of its homegrown talent. Each European country contributes something unique and valuable to the European music stage. Whether it's chart-topping hits or traditional sounds, European artists are making waves and the opportunities for global success have never been greater.

One of the most significant factors determining the shape of music's future is the use of Artificial Intelligence (AI). AI in the service of artists offers exciting opportunities to amplify human creativity, fostering true innovation that enhances the value of artistry across Europe. But done wrong, making human creativity subservient to technology, poses great risk to creators and their art.

That's why we needed a strong AI Act - one that stops AI developers from, amongst other things, using music without permission and payment. It is now essential that the European Commission takes active and effective steps to ensure truly meaningful compliance with the AI Act - consistent with the spirit and letter of the law enacted by the EU.

It's crucial that we continue to support strong, forward-thinking policies in the EU - driving true innovation, by protecting artists and human creativity, supporting a competitive marketplace, and using AI in the service of artists. In doing so, we can secure a thriving future for music in Europe.



VICTORIA OAKLEY
CEO, IFPI

RECORD LABELS: THE BIGGEST SUPPORTERS OF MUSIC

★★★★★★★★
In 2024, record labels invested a total of
us\$8.1bn globally
(approximately €7.5 billion)
in A&R and marketing - just two of the many ways they support the development and promotion of artists and their music.

This was
30%
of record companies' annual physical, digital & synchronisation revenues

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THE EUROPEAN MUSIC MARKET 2024 **IN NUMBERS**

20.7%
The EU market's share of global recorded music revenues in 2024

€5.7bn
Recorded music revenues in the EU in 2024

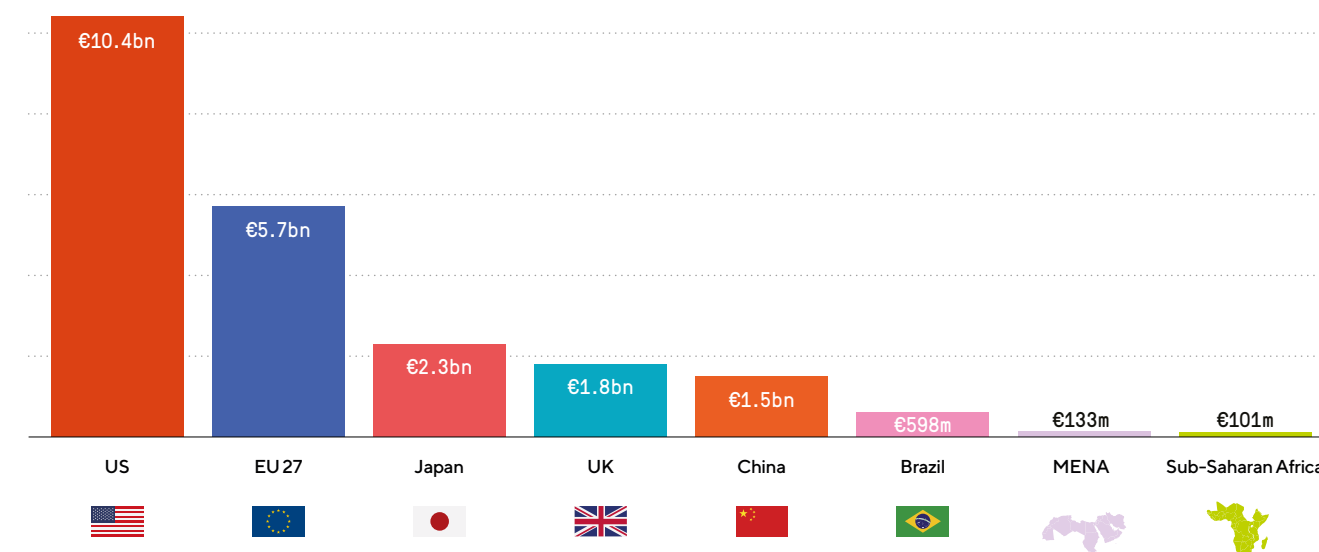
+9.1%
Recorded music revenue growth in the EU in 2024

Aya Nakamura photo courtesy of Warner Music Group
Andrea Bocelli photo by Luca Rossetti
GAZO photo by Fifou

THE EU IS A KEY REGION FOR RECORDED MUSIC

The EU has a significant recorded music market that is extremely competitive in the global landscape, second to only the US.

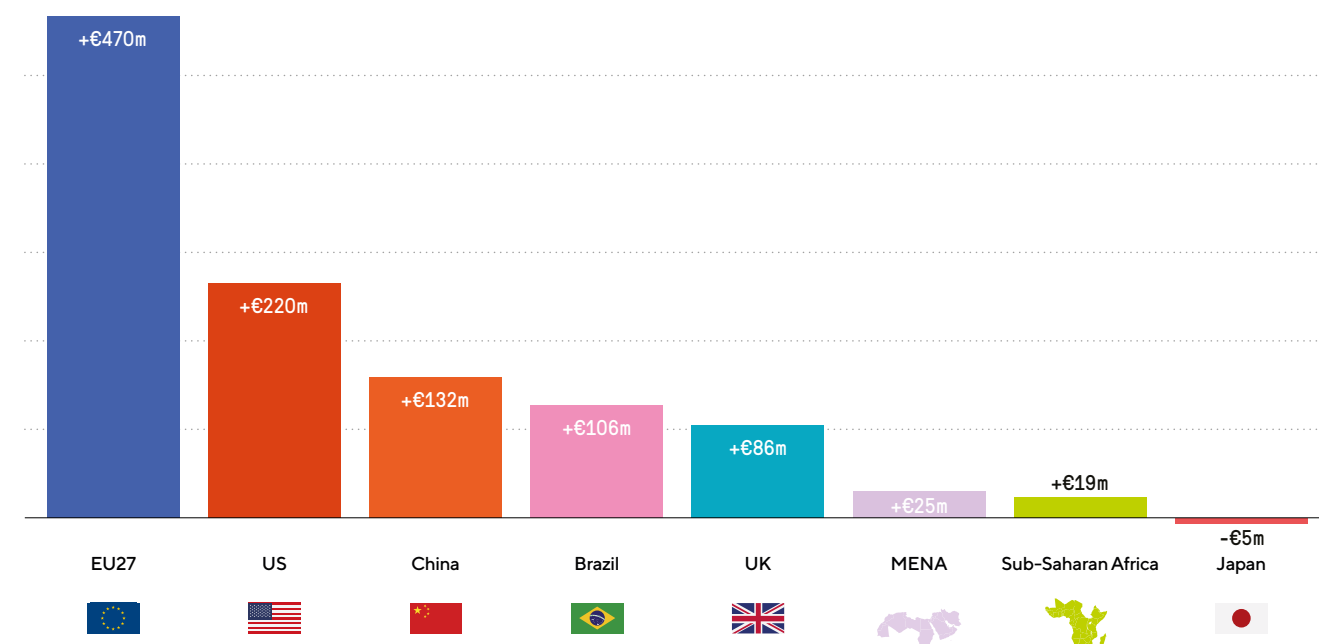
Revenues by region/market: 2024



IN 2024, THE EU GENERATED MORE REVENUE GROWTH THAN ANY OTHER REGION OR MARKET

The industry's revenue growth in the EU (by value) was more than double that of the United States and surpassed the combined revenue growth of the United States, China and Brazil. The growth in the EU was driven by a rise in paid subscribers to streaming platforms and price increases.

Revenue growth by region/market (€): 2024



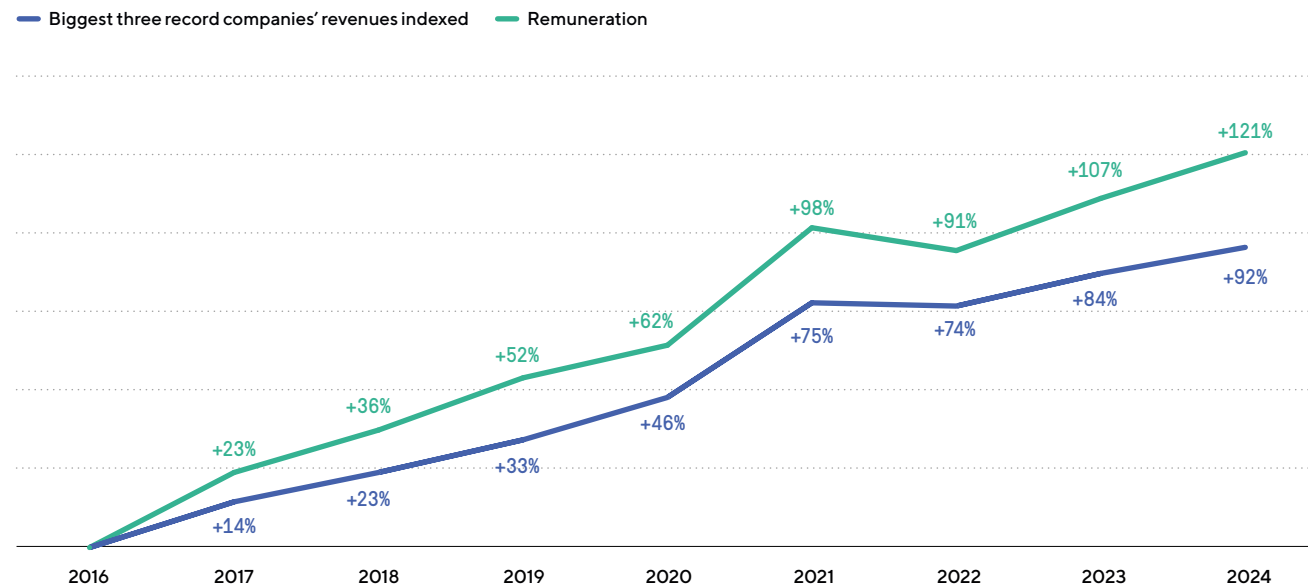
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ARTISTS ARE INCREASINGLY BENEFITTING FROM THE INDUSTRY'S GROWTH

Remuneration for artists who are working with the three biggest record companies is growing at a higher rate than the respective recorded music revenues of those companies. Artists can also benefit from additional revenues their record labels help them generate – such as merchandise, live, brand partnerships, immersive gaming and others.

Between 2016 and 2024, artist remuneration from recorded music increased globally by 121%, ahead of the record companies' respective global revenues which increased by 92% over the same period.

Global revenue growth and artist remuneration growth indexed against 2016: 2016-2024 [%]

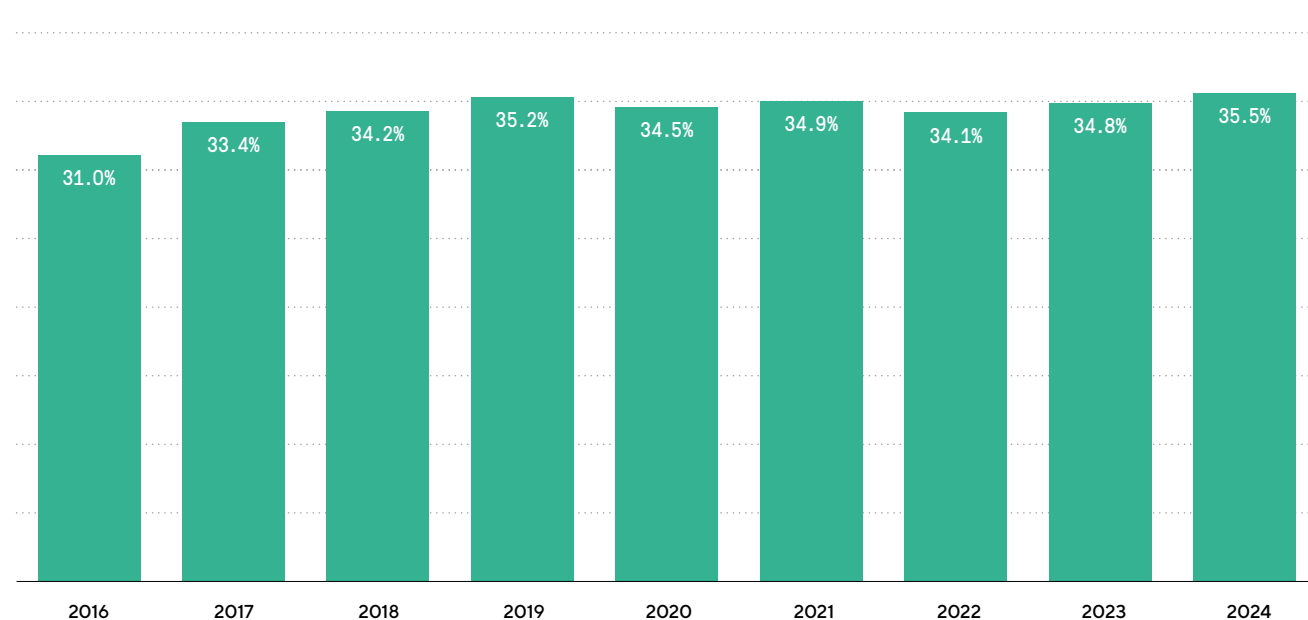


Artist remuneration as a share of record companies' physical, digital and synchronisation revenues* was 31% in 2016 and has grown to 35.5% by 2024.

Artists working with a record label are receiving an increasing share of growing industry revenues, whilst also benefitting from their investment, expertise, resource and global infrastructure.

* The remuneration and revenues relate to the three biggest record companies across physical, digital and synchronisation. These figures do not include label distribution deals.

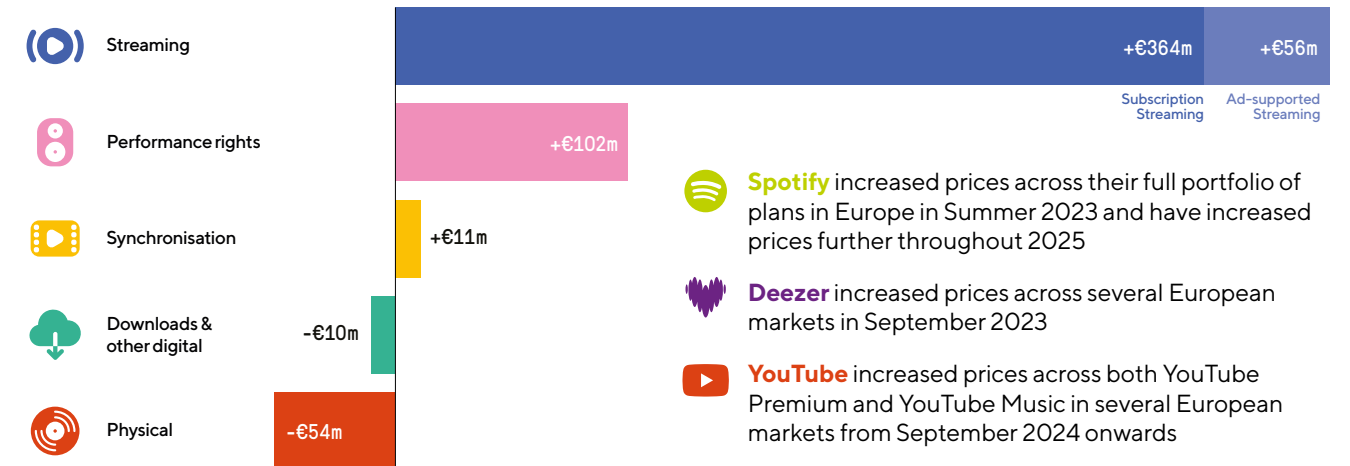
Artist remuneration as a proportion of global revenues: 2016-2024 [%]



FANS' ENGAGEMENT WITH PAID STREAMING IS THE MAIN DRIVER OF GROWTH IN THE EU

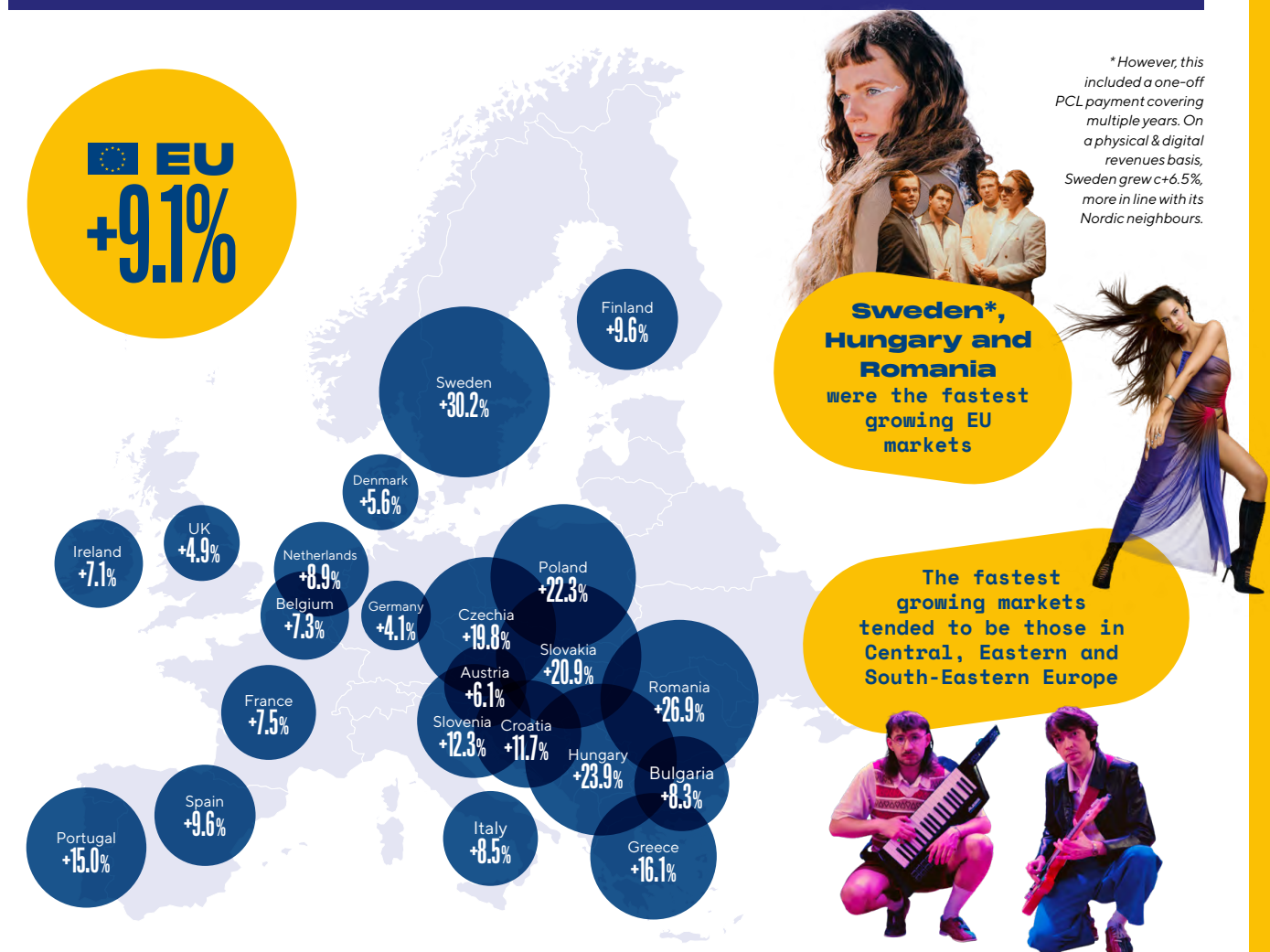
In 2024, 77.4% of the EU's recorded music revenue growth was derived from fans' engagement with music on paid subscription streaming. The EU's recorded music market has benefited from strong paid subscriber growth and music streaming service price increases.

Revenue growth by format – EU27: 2024



ACROSS THE EU, RECORDED MUSIC INDUSTRY REVENUES ARE GROWING AT DIFFERENT RATES

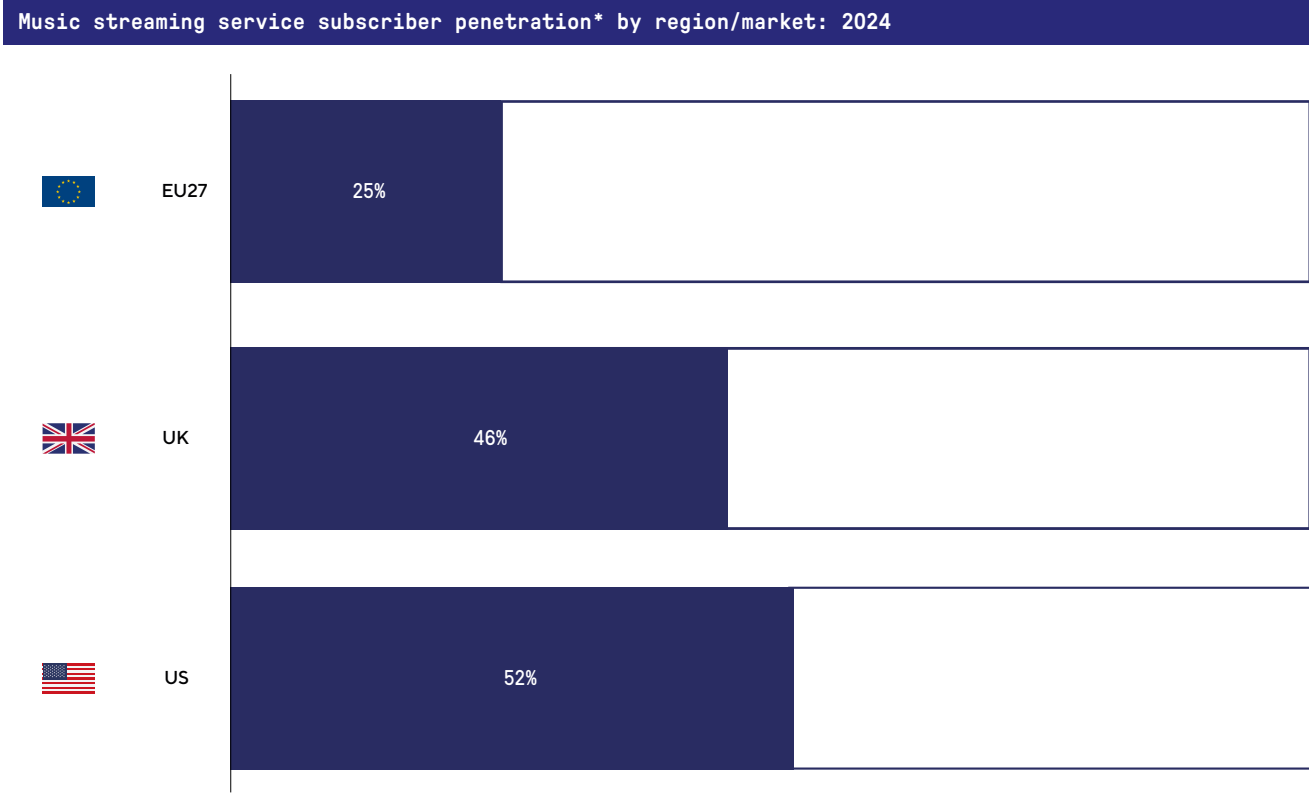
EU markets' recorded music revenues - year on year growth: 2024 [%]



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THERE IS GREAT POTENTIAL FOR FURTHER GROWTH

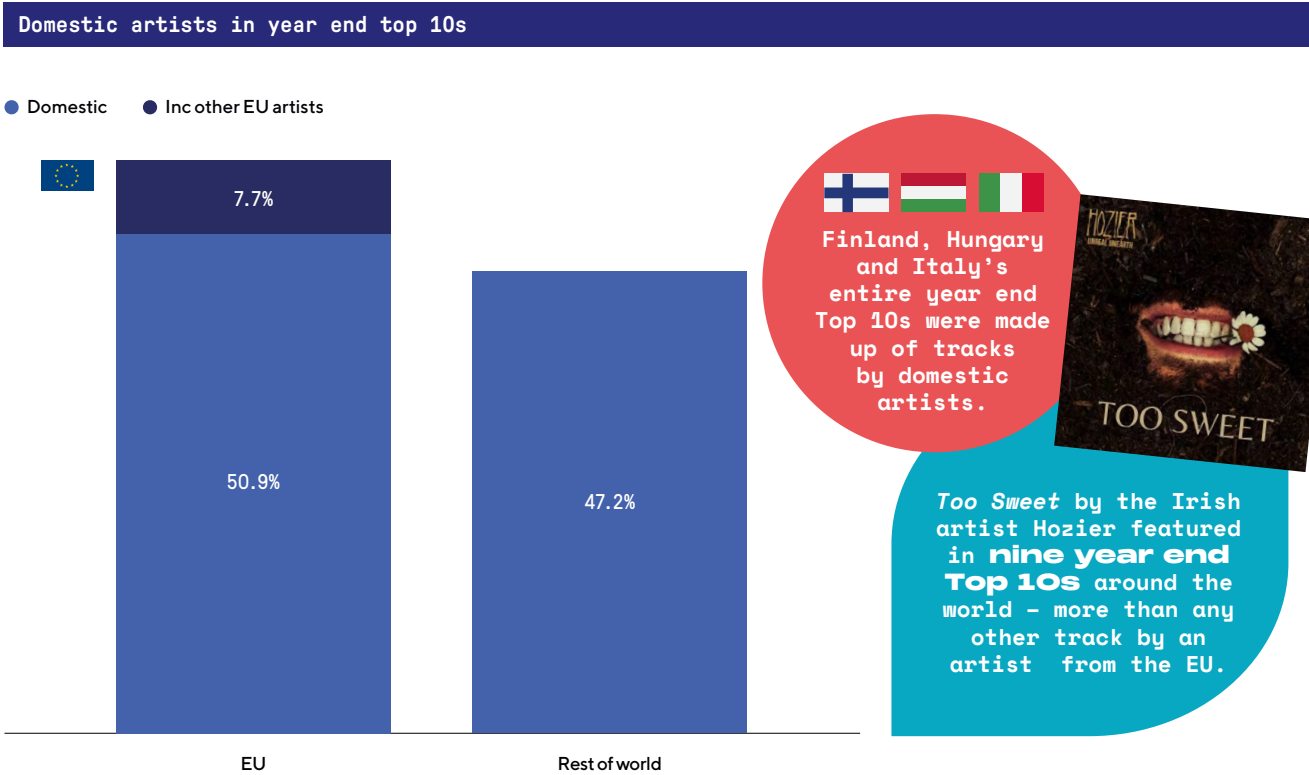
While the EU music market is performing well, the EU’s streaming subscriber penetration rate is much lower than those of other leading markets.



*Penetration is calculated as the number of users of subscription accounts as a proportion of the market/region’s population

HOMEGROWN ARTISTS SEE STRONG COMMERCIAL SUCCESS IN THE EU

In the EU, an average of 50.9% of tracks in a country’s year-end top 10 were by domestic artists, with a further 7.7% by artists from other EU countries. In the rest of the world, the domestic share was 47.2%.



Franglish photo courtesy of Universal Music Group

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THE ROLE OF EUROPEAN RECORD LABELS

In today's competitive music market, record labels find and nurture new talent, supporting an artist to realise their creative and commercial potential.

This partnership is the cornerstone to a broad music sector, bringing many component parts of the ecosystem together.



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Sara James
photo by Jan Dybus

CASE STUDY

POLAND:

A rising force in the European musical landscape

In music's evolving story within the European Union, few regions have experienced the same pace of transformation as Central Eastern Europe. Long home to rich musical traditions, the region is now a focal point for digital growth, global discovery and international success stories.

► INTERVIEW

MACIEJ KUTAK

CEO Poland and SVP Central Europe, Universal Music Group

Poland sits at the centre of this transformation. With a population of nearly 37 million, a growing economy, and fast-rising streaming subscription rates catching up to the European average, it's become both a cultural driver and an economic growth opportunity.

Maciej Kutak, Universal Music Group's Poland CEO and SVP of Central Eastern Europe says, "Poland is leading a wider cultural and commercial shift happening across the region - we are experiencing a hugely exciting moment."

A standout example of this success in Poland is Sara James. As a shining example of homegrown talent, her debut album was supported with a coordinated rollout across the continent, including promotion activity and live showcases in Germany. She also collaborated with Czech artist Ben Cristovao - an alliance that has already yielded two Top 50 radio tracks and a joint performance at this year's Metronome Festival.

Sara has also made history by becoming the first Polish artist to be placed on Spotify's global New Music Friday playlist. Nearly half of her total music consumption now comes from outside Poland, underlining her growing international reach and the international appetite for talent emerging from the region.

Another clear sign of the momentum in Poland is the 2024 remix of the Polish hit Chyba Że Z Tobą by Modelki, reimagined by UK producer Jax Jones.

As Kutak explains: "The remix not only bridged Polish and UK pop markets, but also served as a cultural moment, amplified by a joint live performance, showing how local content can be elevated through international collaboration without losing its core identity."



Fantomel & Kate Linn
photo by Marian Adochitei

Record companies, such as Universal Music Group, are playing a pivotal role in scaling up the regional music ecosystem in Poland. Driving much of this success is deliberate investment in the infrastructure that supports local talent whilst also working hand-in-hand with artists to achieve success both at home and internationally.

As Kutak explains: "In Poland alone, we have built three fully equipped in-house recording studios, alongside a professional video studio. In Romania, we have four studios, Czechia has two. These spaces are hugely important because they offer artists creative freedom and best-in-class tools to try out ideas which previously were unavailable to them."

In today's music industry, releasing a track is only the beginning. Cutting through the noise and building a fan base requires coordination, experience and strategic support - something record labels are uniquely positioned to provide.

Kutak is quick to point out that infrastructure is only part of the equation. "The know-how is crucial, and the strength of our label lies in its people. We bring together teams of experts who deeply understand what works in our markets. Their local insight, combined with global perspective, means they can tailor strategies for our artists which truly connect with audiences. This is

particularly important for us because Central Eastern Europe is a region of incredible cultural diversity."

As the music industry in Poland and across the wider region continues to evolve at pace, record labels are playing an essential role in driving the industry forward.

Kutak puts it simply: "Without labels here, many of the positive stories we are seeing coming from this region wouldn't be possible. We're here to support artists at every stage - to help them achieve local and global impact on their own terms."



Without labels here, many of the positive stories we are seeing coming from this region wouldn't be possible. We're here to support artists at every stage - to help them achieve local and global impact on their own terms."

MACIEJ KUTAK
CEO POLAND AND SVP
CENTRAL EUROPE,
UNIVERSAL MUSIC GROUP

22.3%
recorded music
revenue growth
in Poland in
2024



Ben Cristovao photo
by Butterfly Kids

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KAJ photo by Erik Åhman

► INTERVIEW

MARK
FRY

President, Warner
Music Nordics

According to Mark Fry, President of Warner Music Nordics, KAJ's success is part of a broader strategy to help Nordic talent take off internationally without necessarily singing in English. He says: "We've always believed that language should be a bridge, not a barrier. KAJ demonstrated that the right mix of cultural authenticity and musical creativity could resonate with audiences both locally and internationally."

Fry says of the merging of cultures: "At Warner Music, we are focused on building regional success that can transcend borders. KAJ is a perfect example of how we're thinking beyond country-specific markets and embracing a more Nordic-wide approach." He continues: "We believe in the power of cultural curiosity. It's about embracing the uniqueness of each Nordic country while recognising that there's power in working together as a region."

And in the spirit of making language a bridge rather than barrier, the reaction to KAJ's appearance at Eurovision 2025 was impressive. Ranking among the favourites throughout the competition, KAJ showed that regional music has global appeal while also reinstating the popularity of the 'comedy song' with playful lyrics about the Nordic passion for saunas. It was also the first Swedish-language song at Eurovision since 2012 - another powerful symbol of their identity and cultural heritage.

Fry adds: "KAJ's success is a great example of how local music, with the right strategy, can make a huge impact. The track surpassed 100 million streams, and we're only just getting started."

CASE STUDY

🇩🇪 🇸🇪 🇫🇮 🇳🇴 🇩🇰 🇸🇪 NORDICS:

The growing musical influence of the Nordics in Europe

Known for blending comedy, theatrics, and catchy pop tunes KAJ has taken the global stage by storm. The Swedish-speaking Finnish trio's journey to international fame started with a standout performance at Melodifestivalen, Sweden's televised competition to find a Eurovision entrant, which propelled them to the top of the Finnish and Swedish charts. A few months later in May, they took Eurovision 2025 by storm, singing their track 'Bara Bada Bastu' in the Vörå dialect of Swedish. The trio challenged expectations and broke down linguistic barriers.

Warner Music Nordics always had a global audience in mind for KAJ, which began by building local support with Melodifestivalen. Fry explains: "While it's all about having a plan that goes beyond the Melodifestivalen, the contest lights up the Swedish charts without fail every year. Our focus is then on using those moments in the content to boost the artist's visibility globally."

He adds: "We knew that success in Eurovision and Melodifestivalen would help open doors, but we didn't want to stop there. We've been looking at opportunities in countries where Swedish-language music hasn't traditionally had much of a presence, like Germany, the Baltics and even Asia."

The band's development has been championed by their label from the start. By working within a centralised Nordic structure, Warner Music offers artists support from various departments,

including A&R, marketing, and promotion. Fry says this approach has several benefits. "Having a structure where we can offer cross-border support, whether in marketing or artist development, is crucial," he says. "It's about creating an ecosystem that enables artists to succeed beyond their local markets."

This strategy also gives artists support in mixing genres and languages. Fry sees KAJ as a prime example of how music can blend genres and reach new audiences. "We're seeing more and more artists experiment with language and genre fusion. In KAJ's case, their ability to mix Finnish and Swedish, with a fun, quirky approach, is what sets them apart," he says. "It's an exciting time for music, and they're at the forefront of this wave."

+10.6%
Finland outpaced its
Nordic counterparts
in recording the
most streaming
growth in 2024

KAJ is going from strength-to-strength and Fry is confident that their journey has just begun. "We've only scratched the surface," he says. "KAJ is not just a Melodifestivalen or Eurovision phenomenon; they're a band with international appeal, and our aim is to make sure that their music reaches audiences around the world."

We believe in the power of cultural curiosity. It's about embracing the uniqueness of each Nordic country while recognising that there's power in working together as a region."

MARK FRY
PRESIDENT, WARNER
MUSIC NORDICS

KAJ photo by
Erik Åhman



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Minelli photo courtesy of Global Records

CASE STUDY

ROMANIA:

A look at Eastern Europe's leading music exporters

Romania is fast emerging as one of Europe's most dynamic music markets. At the heart of this is Global Records – Romania's leading independent label – which has grown up from a local start-up to one of Eastern Europe's leading music exporters.

► INTERVIEW OLGA JUVERDEANU Managing Director, Global Records

As Managing Director, Olga Juverdeanu, explains: "Romania's music scene is uniquely vibrant and dynamic" making it fertile ground for creativity. Having been shaped by its Latin roots, Balkan influences and fearless willingness to blend genres, Juverdeanu continues: "Musicians here are not afraid to experiment, to mix influences and to collaborate. It's this cultural openness that makes Romania such an exciting music market in European and the world".

At the heart of Global Record's success is a deep commitment to A&R and artist development – the beating heart of a label which is constantly evolving.

"The role of the record label has shifted a lot with streaming" Juverdeanu explains, "It is now more important than ever that we align with each artists' individual career development and provide a truly personalised strategy. We build a 360-degree ecosystem around the artist."

Global Records has built this model in house – a tight-knit team with an A&R core, 21 fully equipped music studios and dedicated divisions for TikTok, playlisting, digital promotion, video production, endorsements, live events and beyond.

As Juverdeanu explains: "Everything starts in the studio. We make sure we give our artists room to experiment with different songwriters and producers before engaging our promotion and marketing teams. Everything works hand in hand under one roof, but it all starts with that initial creative process."

As a result, the labels roster is full of success stories that demonstrate how an independent record label can push local creativity into the global mainstream. Juverdeanu points to



Minelli photo courtesy of Global Records

Romanian singer-songwriter Minelli's hit Rampampam as one example: "We had an international focus from the start on Minelli because she always composed and sang in English and connected directly with global trends." The track went on to top streaming charts and radio airplay across Europe – proof that Eastern European talent can travel beyond borders.

However, there is no single recipe to success as Juverdeanu continues: "It's about having the courage to experiment and working with a label that is willing to let that creative process unfurl whilst also investing in all the right channels to capitalise on every opportunity."

Moldovan singer-songwriter Irina Rimes' track Dudadu is an example of Romanian success happening in a more unexpected way. Originally a Romanian-language song with strong folklore influences, it crossed borders in the hands of a remix that blended Afro-house beats – catching the attention of global DJ's like Tiesto and Steve Aoki who played it at Tomorrowland – one of Europe's largest festivals.

"Unexpected collaborations like this are key and it's something we work hard to facilitate for our artists through our strong creative networks," Juverdeanu says. "We always encourage our artists to work with local stars from around the world to break into new markets."

Despite the success of Global Records, Juverdeanu also explains the challenges that artists and record labels in Romania still face, and the vital importance of supportive policy frameworks.

"We believe the best place to be an artist in Europe is Romania because we have great production infrastructure and a culture of experimentation."

And independent labels like ours play a vital role in nurturing local talent and exporting local culture – but we need the right support so that we can keep experimenting, keep investing and helping our artists succeed both at home and globally."

The continued success of Global Records is proof that Europe's music sector is an engine for growth and cultural export. "At the end of the day," says Juverdeanu, "there's nothing more important than the music, and the magic that happens when you put artists at the centre."



Irina Rimes photo courtesy of Global Records



At the end of the day, there's nothing more important than the music, and the magic that happens when you put artists at the centre."

OLGA JUVERDEANU
MANAGING DIRECTOR,
GLOBAL RECORDS

29.7%
streaming revenue
growth in Romania
in 2024

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Orelsan photo courtesy of Sony Music Entertainment

CASE STUDY

FRANCE:

How music companies are creative partners in an artist-forward world

France's recorded music industry stands out in Europe for its deep culture and continued investment in local talent. In 2024, the French market grew by over 7% overall, a reflection of the growing potential and opportunities for artists at home.

► INTERVIEW

MARIE-ANNE ROBERT

Managing Director,
Sony Music France

● Within this environment, record labels take an increasingly artist-focused approach. At Sony Music France, Robert has championed a model where the label acts as both a creative partner and long-term career builder.

"Our job is not just to help make hits," says Robert. "It's to support the artist's vision creatively, emotionally, and strategically – to help them build something that lasts."

One of the most striking examples of the artist-focused approach is the career of Orelsan, one of France's biggest contemporary artists.

Sony Music France has developed a partnership that helps him develop projects far beyond recorded music. By joining forces not only on albums but also on projects like Orelsan's upcoming film "Yoroi", due to be released in cinemas on October 29th, Sony Music France highlights its dedication to nurturing artistic vision wherever it leads. Such collaborations not only expand the artist's reach and impact but also reinforce the role of music companies as enablers of creativity, ready to follow and uplift the artist's journey into any dimension. Robert sees the culmination of this resulting in a broader fanbase, the potential for multiple awards, and a deeper cultural impact.

"Orelsan is a perfect example of how we can co-create with an artist across multiple formats," says Robert. "We're not just supporting the music, we're building a whole narrative universe around him."

This kind of investment takes time and a deep trust between artist and label to build the foundation of an artist-centred strategy.



Star Academy photo courtesy of Sony Music Entertainment

The revival of Star Academy, a hugely popular music talent show in France, also highlights how music companies can act as platform builders for emerging artists. Sony Music France became the exclusive label partner for the show, signing the contestants and working to build a full post-show strategy. In addition to the televised show, the Star Academy Tour has become a massive live event. With over 750,000 tickets sold across two seasons, it has brought together fans of all ages and regions, confirming the program's role as a unifying force in French music culture.

"We didn't just sign the winner," explains Robert. "We signed the several contestants, and we're working with them based on their individual strengths to build their careers long-term."

The initiative resulted in a hit group album, successful solo projects, and a sold-out national tour, all of which helped launch a new generation of artists into the French music industry. Star Academy has become a powerful cultural and musical phenomenon in France, far beyond a Paris-centric TV format. It resonates across generations and geographies, including rural areas and smaller towns, and plays a key role in bridging fragmented listening habits.

Additionally, one of France's unique

strengths lies in its resilient physical market, which continues to account for 16.9% of overall recorded music revenues in the country. France has seen a continued strong demand for physical products, with vinyl, boxsets, and merchandise now representing a boosted opportunity for artists. Marie-Anne Robert, Managing Director of Sony Music France, sees this model as a creative opportunity. "Physical is not nostalgia," she says. "It's a way for artists to express themselves by creating collectible, story-driven objects that fans want to own."

French artists are also now reaching global audiences with growing frequency, especially in rap, Afrobeats, and pop. Artists like Jain have broken new ground by staying true to their identity while exporting their sound internationally – resulting in a Grammy nomination amidst tough global competition such as Kendrick Lamar and Jay Z. Another example is French pop urban artist Nej', who sings in French, but sees two thirds of her streams from abroad.

"You don't have to change who you are to succeed internationally," Robert says. "Our job is to amplify the artist's voice, not translate it into something else."



Our job is not just to help make hits. It's to support the artist's vision creatively, emotionally, and strategically – to help them build something that lasts."

MARIE-ANNE ROBERT
MANAGING DIRECTOR,
SONY MUSIC FRANCE

She also emphasises the label's responsibility to provide transparency and education, especially for younger artists navigating fast change. An artist-focused approach also means investing early, especially in genres and voices that may be outside the current mainstream. From regional rap to experimental pop, Sony Music France works across a diverse spectrum of styles and backgrounds.

"We're here to help artists find their audience, whether that means playing with format, redefining genre, or breaking the rules," says Robert. Initiatives like Sony Music's involvement in Star Academy also show how traditional formats such as TV can be reimaged to support today's artists in more flexible, empowering ways.

France offers a powerful example of how record labels are adapting to serve artists in today's complex music ecosystem. By supporting long-term careers, investing in creativity, and building fan-focussed formats, labels like Sony Music France are redefining what it means to be artist-centric.

As Marie-Anne Robert puts it: "Our role is to support the artist's vision, not to control it. That's what being a true partner means today."

#2

France has the second largest physical market in the EU, behind only Germany

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Loreen photo by Charli Ljung

CASE STUDY

+ SWEDEN:

A look at Europe's music export power-house

Sweden, a country of just over 10 million people, has consistently punched above its weight in the global music industry. With a legacy spanning from ABBA's global domination in the 1970's to the more recent success of AVICII and Zara Larsson, Sweden has built a reputation as one of the most successful music-exporting nations in the world.

► INTERVIEW LUDVIG WERNER Managing Director, IFPI Sverige

● This remarkable success is not accidental. It stems from a unique blend of cultural prioritisation, state support, education and an innovative music industry infrastructure.

One of the fundamental reasons behind Sweden's success is the country's long-standing commitment to music education. As Ludvig Werner, Managing Director, IFPI Sweden and Chairman of the Board of Export Music Sweden, explains: "Across Sweden there is a network of community music schools. Whilst there are limited spaces, the cost is subsidised by the government making them accessible to a diverse group of people. Almost everybody did it from the 3rd grade when I was a kid – you could go to school and try out different instruments. When we talk about Swedish music exports, it's important to acknowledge how fundamental this is."

Other initiatives include 'study groups', run by not-for-profit organisations and partly funded by the government, they often provide rehearsal space and resources. Werner explains that music, alongside other artforms, is actively encouraged within these: "Most people I know in music now started out using this scheme which didn't just provide, but actively encouraged and facilitated, giving kids the space, time and funding to nurture their art."

What these programmes have helped breed is an abundance of Swedish talent which, over the decades, has propelled Sweden onto the global map for music. While ABBA's success in the 1970's demonstrated that Swedish music could resonate worldwide, they've since been joined by a wealth of domestic superstars who have ensured Swedish music has been a constant presence on the global stage ever since. These include



Tove Lo photo by Moni Haworth

Roxette, The Cardigans, Avicii, Ace of Base, Europe, Zara Larsson, Robyn, Tove Lo, Icona Pop, Swedish House Mafia, Lykke Li, Benjamin Ingrosso and a string of world-famous heavy metal bands.

The music ecosystem in Sweden is a unique one, particularly in the EU. As Werner explains: "Swedish music is more geared for export than say other European countries because of language – most Swedish music tends to be in English".

+18%
Swedish net export
revenues grew to 5.4
billion Swedish kronor
(approximately €470m)
in 2023

Source: Musiksverige

It is also unique because of its longstanding relationship with innovation – most famously with Spotify, the Sweden founded platform which revolutionised music listening when it launched in 2008 and is now the world's most popular audio streaming service. There have been others: the music service Soundcloud was launched by two Swedish entrepreneurs and Epidemic Sound, a royalty-free soundtrack hosting company, is based in Stockholm, Sweden.

Werner explains: "The shift to streaming platforms changed the potential for music to travel for everyone. And for Swedish music it meant all of a sudden it could be consumed in Italy, and India and Mexico without having to have a physical presence there. Artists could be discovered regardless and with Sweden's history of successful exports, it just meant we could capitalise on this very quickly."

Sweden's success is also anchored in a strong ecosystem of record labels – operating globally whilst maintaining critically strong local roots. As Werner says: "Discovering and nurturing the development of Swedish artists is of course the starting point but Swedish labels are also constantly alert to the artist's potential to appeal to an audience outside of Sweden. The global networks that the record labels have then play a huge role in these artists finding international success."

Beyond Swedish music's commercial value, it plays a critical role in projecting Sweden's national identity and enhancing its global image. Sweden has long cultivated a brand of being modern, creative and socially responsible and through its music, has reinforced this on the world stage. Whether through Loreen's Eurovision-winning performances or Robyn's avant-garde emotional pop, Swedish artists often embody values of individualism, inclusivity and artistic freedom.

"It's hard to overestimate just how important music is – and how valuable in terms of money – music is to the soft power of Sweden. It's one of the most important tools we have, and it means so much to Swedish people when they travel – to see how much love there is around the world for Swedish music too", says Werner.

"But Swedish music export success is not a self-playing piano. It's needs to be supported and nurtured. Going forward, the industry is working hard alongside the government to ensure the continuation of Swedish music's incredibly story so far. We're a small country – we need music for democracy, we need it for export, and we need it for people's happiness in the country too".



It means so much to Swedish people when they travel – to see how much love there is around the world for Swedish music too."

LUDVIG WERNER
MANAGING DIRECTOR,
IFPI SVERIGE



ABBA photo by Barry Levine

EMBARGOED UNTIL 5PM CEST MONDAY 22nd SEPTEMBER 2025

EUROPEAN POLICY MANIFESTO

Music is a powerful force that shapes Europe's culture, economy and identity. It brings people together, reflects our shared history, and helps define our future. Yet, despite its profound impact, music often remains undervalued in EU policymaking. Here are five key areas where the situation could be improved.

1. **Recognise the vital role of music in the EU**
2. **Support a competitive marketplace for music in Europe**
3. **Ensure AI and creativity grow and thrive together**
4. **Protect artists' music**
5. **Promote strong copyright in Europe and abroad**



Zoë Livay photo courtesy of Warner Music Group



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1

Recognise the vital role of music in the EU

Music should be recognised as a pillar of Europe's unique cultural identity and a catalyst for growth: a driver of innovation, a creator of skilled jobs, an engager of young people, and a significant contributor to Europe's global standing. Public policies need to embrace music not as an afterthought, but as a fundamental part of Europe's cultural and industrial fabric.

EU institutions must strengthen their commitment to securing the continued growth of the European music sector by ensuring that the rules of copyright protection and enforcement are clear and effective. This will enable our industry to keep investing in European music and artists.

The EU should also conduct regular and meaningful evaluations of the sector's contributions to Europe's economy, society and culture. Measuring music's full impact on jobs, innovation, and youth engagement to support future policy decisions must be a priority.

Supporting music is not only a commitment to Europe's cultural legacy, it is a smart industrial policy that will continue to build Europe's creative and economic future.

2

Support a competitive marketplace for music in Europe

A thriving European music sector depends on a fair and competitive marketplace built on exclusive rights and freedom of contract. These principles are the foundation for continuous investment and innovation in music.

To ensure a healthy music sector, European policies must protect the existing free-market licensing system that allows artists and right holders to negotiate fairly and securely with licensees on the terms of use of their music. Free market licensing provides the necessary flexibility to address the diverse needs of both licensors and licensees, which is especially important considering the rapid development of technologies such as generative AI.

Undermining exclusive rights through new exceptions or limitations to copyright, or mandatory licensing schemes, would weaken Europe's cultural industries by reducing incentives to create and invest in creativity. Instead, the EU should focus on fully implementing existing legal frameworks, including those supporting the enforcement of rights.

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3

Ensure AI and creativity grow and thrive together

The use of Artificial Intelligence (AI) presents both new opportunities and urgent challenges. Within the EU, the focus must be on ensuring that AI developers respect copyright, comply with transparency obligations, and operate within a clear legal framework.

While AI can be used to support creativity and innovation, it can never replace the unique value of human artistry. Music is an expression of human culture, emotion, and experience, not just data. The development of AI models must respect the value of human creativity, and the use of copyright works in this process must be done in a way that recognises and protects creators.

The EU AI Act is world-first legislation that seeks to regulate the development and use of AI and set an example for responsible AI governance. The General Purpose AI (GPAI) Code of Practice, the Transparency Template and the GPAI Guidelines are crucial to the successful implementation of the AI Act. Unfortunately, thus far, they risk falling short of delivering on that promise. It is essential that the European Commission now takes active and effective steps to ensure truly meaningful compliance with the AI Act. Only this will foster an environment where rights and commercial freedoms are respected simultaneously through free market licensing to develop AI models, which in turn will kickstart more partnerships and innovation.

Europe has a unique opportunity to show global leadership in the application and enforcement of a fair regulatory framework for AI, for the benefit of EU citizens, right holders, the AI sector, and wider economy.



► We continue to see the rise of AI-generated deepfakes and voice clones – using and abusing an artist's voice, image, name and likeness without their consent. It is unfair to artists who now must compete with this content, unfair to fans who should be able to trust what they are seeing and hearing is real, and unfair to labels who have invested in the creation of authentic music.

► We continue to call for the robust application and – where needed – enhancement of intellectual property (or other) rights to ensure that artists can protect their voice and likeness.



STAY TRUE TO THE ACT

(AI)

Stay true to the *Act*,
Stay true to *culture*

Transparency, consent, remuneration.

Prominent and up and coming artists from across the EU backed the **Stay True To The Act** campaign, urging EU policymakers to uphold the original intent of the EU AI Act and protect creators from the unchecked use of their work by generative AI companies.



The **Stay True To The Act** campaign is a direct appeal to European policymakers to ensure that implementation of the AI Act reflects its original spirit of transparency, accountability and the protection of European creators.

The artists are calling for:

- **The protection of copyright and innovation**
To be able to create, creators must have rights to keep control of how their work is used and be remunerated for such use
- **Transparency**
AI systems that use creative work must be transparent and comply with existing copyright rules
- **The opportunity**
For music and AI to grow and thrive together in the EU



4

Protect artists' music

The biggest challenge facing the EU's music sector is not the lack of rules protecting music, but the lack of effective enforcement of existing laws. Copyright laws aim to protect right holders, but without rigorous implementation and effective means to enforce them, they cannot fulfil their purpose.

Piracy, in all its forms, undermines the functioning of the market and threatens artists' livelihoods. The EU must ensure full and consistent implementation of its enforcement framework, providing right holders with effective tools to prevent illegal use of their works and recordings. Such tools include effective legal injunctions, notice and stay down systems for online hosting providers (so that previously removed illegal content does not reappear) and access to accurate and up to date data from online intermediaries, so that right holders have the necessary information to take action against copyright infringers.

Meaningful sanctions for infringements of rights are also essential. Without effective enforcement, the music ecosystem cannot thrive.



Case study: ACTION IN GERMANY

Following successful legal action coordinated by IFPI and BVMI, IFPI's national group in Germany, in August 2024 the Düsseldorf Regional Court issued a decision banning the illegal service Pimpyourfollower.de from offering its users the ability to purchase artificial plays, views, likes and followers on various online media platforms including Soundcloud, Spotify and YouTube.

This was the latest in a series of actions taken in Germany. Since 2020, IFPI has obtained preliminary injunctions against six different streaming manipulation services.

IFPI will continue to work on behalf of its record label members to prevent this fraudulent activity and hope that our successes in Germany send a clear message to those who continue to offer these damaging services.

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TACKLING STREAMING MANIPULATION

There is increasing evidence that bad actors are using streaming manipulation tools to artificially inflate the 'plays' of songs – including inauthentic AI-generated songs – on music streaming platforms, so that they get paid royalties by the streaming platforms. This is theft. Streaming manipulation distorts the market, undermines trust in digital platforms, and deprives artists of fair recognition and income. Tackling this form of fraud is essential for a healthy and transparent EU music ecosystem.

The use of generative AI in this area has exacerbated the issue, enabling fraud to be conducted at scale and below the radar of many detection systems on music services.

Record companies are working to address this. They continue to act against the individuals behind the most-used sites selling artificial plays, resulting in illegal services in Germany, Brazil and Canada being required to shut down. They are also working with law enforcement bodies around the world to support their investigations into the criminals behind these activities. However, the industry can make an even greater impact by coming together to prevent fraud by tackling the issue at all points of the music value chain.

Current national laws already offer some tools to address manipulation, but they must be applied effectively and consistently across the EU. The EU should support coordinated efforts to detect, prevent, and sanction fraudulent practices, future-proofing regulations to ensure that digital success reflects genuine cultural impact.



5

Promote strong copyright in Europe and abroad

A robust copyright framework protects cultural diversity and drives economic growth, supporting sustainable development across markets and regions. By embracing strong copyright protection, openness and fairness, Europe can ensure its own creative sectors remain vibrant, diverse, and attractive to international talent and investment. It has the opportunity to show global leadership by promoting these principles abroad.



There are three concrete steps the EU can take in this area:

- 1 The EU's copyright framework must guarantee equal protection for all right holders with no discrimination based on nationality or residence.
- 2 The EU must work with its global partners to ensure that artists from around the world can tour freely within Europe, without burdensome visa requirements that restrict their ability to work, and European citizens' ability to access culture. This must be reciprocated by working to ensure European artists can tour freely outside the EU, promoting European music and culture around the world.
- 3 Protection for European right holders must extend beyond the EU's borders to ensure that European artists and record companies can benefit from the global music market. This includes insisting on full and effective public performance and broadcasting rights globally, including in the US, China, South Korea and Japan. Securing strong copyright protection, in line with the international treaties, should be a central plank of the EU's trade policy.



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IFPI'S GLOBAL MUSIC REPORT 2025

PREMIUM EDITION

The Global Music Report 2025: Premium Edition is the definitive source of data, insights and analysis for the recorded music industry. The report includes detailed analysis of industry revenues across 58 markets and covers streaming, download and physical sales as well as revenues from performance rights and synchronisation.

In addition to the in-depth revenue data, the report also contains important indicators such as the number of subscription streaming accounts worldwide, as well as analysis of the best performing songs, albums and artists in 2024. Used by record labels, streaming platforms, banks, academic institutions and governmental departments, the data provided in the report is an indispensable resource to anyone wishing to understand or invest in the recorded music industry.

The Premium Edition is available now and can be purchased at gmr.ifpi.org, or by contacting IFPI directly at ritco@ifpi.org.

The Premium Edition report is available at discounted pricing for companies in the recorded music sector as well as governmental and academic institutions. Please contact ritco@ifpi.org for more information or to see if you qualify for this pricing.

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IFPI is the voice of the recording industry worldwide, representing over 8,000 record company members across the globe. We work to promote the value of recorded music, campaign for the rights of record producers and expand the commercial uses of recorded music around the world.