

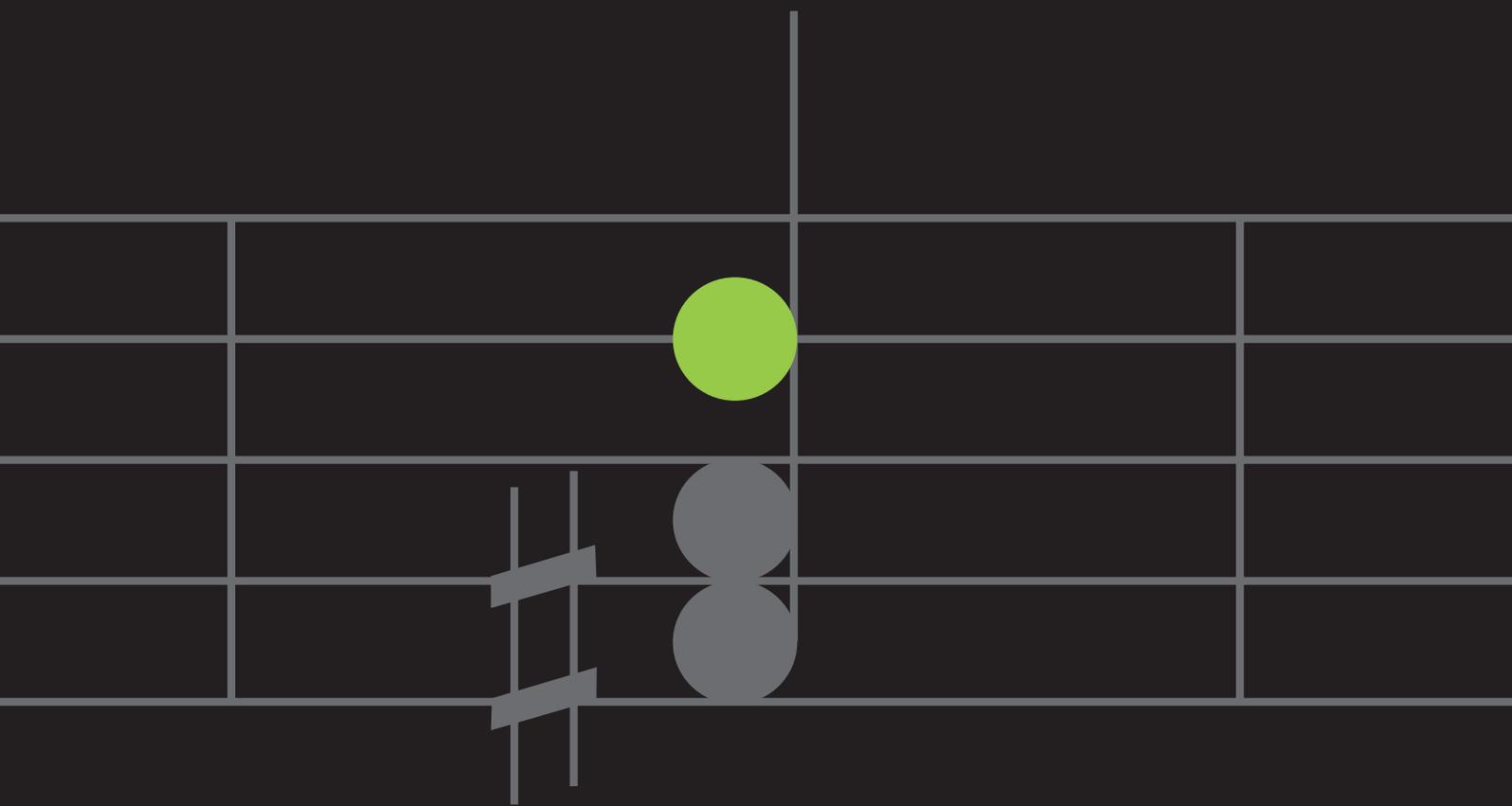
The recorded music market in 2013

The definitive source of global music market information

RECORDING INDUSTRY IN NUMBERS



2014 EDITION



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INTRODUCTION BY FRANCES MOORE, CEO, IFPI

AN INDUSTRY MOVING TOWARDS SUSTAINABLE GROWTH

Welcome to IFPI's annual Recording Industry in Numbers. This report provides an unrivalled analysis of the global recorded music industry, examining the latest international trends and providing detailed figures for 50 territories worldwide.

The broad picture that emerges is of an extremely diverse industry. Most of our major markets have stabilised, digital continues to grow, revenue streams have diversified and we are starting to deliver on the huge potential in emerging markets.

Yet attention will inevitably fall on the overall market, and global revenues are down 3.9 per cent. To put this in perspective, this decline was driven by sharply declining revenues in Japan, a market which accounts for one-fifth of global revenues and is right at the start of its digital transition. Japan alone accounted for 98 per cent of the global market decline, or to put it another way, outside Japan revenues were essentially flat, down just 0.1 per cent.

The difficulties in one market, however large, should not divert us from a broader story of digital opportunity: diversification and innovation from new digital models, as well as the ability to reach new geographical markets.

The US market has consolidated and trade revenues have grown, helped in particular by the success of subscription services. Europe has returned to growth after 12 years with its top six markets – France, Germany, Italy, Netherlands, Sweden and the UK - all reporting positive figures.

Globally, we are seeing the rapid growth of subscription services. Having transformed markets such as Norway, South Korea and Sweden, we are now

seeing these services doing the same in Denmark and the Netherlands.

Advertising-supported services are also continuing to grow, with the monetisation of YouTube in particular. This helped global digital revenues increase overall by 4.3 per cent in 2013.

And it's not just digital income that is growing. Performance rights income - revenues from broadcast, venues and internet radio - grew once again – now up to more than US\$1 billion.

We're even seeing a revival in vinyl, a format that many people thought would die, as some music fans continue to want a physical product with accompanying artwork and liner notes that vinyl still delivers best.

It is fair to say that the recording industry now distributes music through a portfolio of businesses, from vinyl sales to streaming services. It is this range of formats that is a source of strength and future growth.

Another source of huge potential for our industry are the emerging markets around the world.

Smartphone and feature phone technology is helping us to reach consumers where we previously had little business because of a lack of retail infrastructure. There is a real pioneering spirit as record companies expand into these new territories.

International services such as Deezer, iTunes and Spotify continue their global expansion and between them are now present in more than 150 territories. Record labels are working with their partners to tailor their business models in emerging markets, delivering new offerings such as pre-paid daily subscriptions in Brazil and mobile carrier partnerships in Africa.



Frances Moore. Photo by Graham Flack

But despite all this activity and optimism, piracy continues to have a market-distorting impact with more than a quarter of internet users worldwide still using unlicensed services despite the legitimate alternatives. These unlicensed services offer unfair competition to legitimate businesses offering digital music, reducing their ability to reach their full potential in terms of growth and revenue. That is why we are working with other internet intermediaries to help curb the flow of finance to pirate services and make them more difficult to access. We need all players in the internet economy to play their part in helping nudge users towards licensed services. We also need policymakers to stand up for the copyright protection that enables us to continue to invest in artists and repertoire.

The figures in this report highlight a world of opportunities for the recorded music industry. If we can secure improvements in the legal environment in which we operate, then we can move on from the consolidation of the last couple of years towards sustainable growth.



WE HAVE LIFT-OFF

It's been a phenomenal year for Deezer. We've recorded Sessions that'll get your spine tingling and shared memorable live shows. We've hacked with the best devs to bring you apps to bop with your kids, clock up the best gigs in town, or show your love for your favourite band. We've recommended more new music to more people around the world. We've welcomed debate around streaming in the press, on blogs, and on the street. But most of all, working with artists and labels we've helped reimagine the future of music, giving fans everywhere a truly personal listening experience.

WE SEE CLEAR SKIES AHEAD.



RECORDED MUSIC SALES IN 2013

SHARP DECLINE IN JAPAN MASKS STABILITY IN MOST MAJOR MARKETS

Global recorded music revenues totalled US\$15.0 billion in 2013, down 3.9 per cent from 2012. This decline was primarily driven by a sharp decline in Japan - a huge, unique market with specific challenges in its transition to digital.

The world's second largest music market, Japan, accounts for a fifth of global revenues. 80 per cent of those revenues come from physical format sales and most of the country's digital revenues are derived from music services tethered to feature phones. Both these revenue streams fell heavily in 2013, impacting on a picture of growth or stabilisation in most major markets.

Outside Japan, most of the world's major music markets saw digital growth, driven by subscription services in particular. This, coupled with slowing declines in physical sales, contributed to an overall picture of stability with the global market flat, down just 0.1 per cent outside Japan.

The US, the world's largest music market, accounting for 30 per cent of global revenues, grew 0.8 per cent in 2013. Growth in Europe's top six largest markets, Germany, the UK, France, Italy, Sweden and the Netherlands saw the region record overall growth of 0.6 per cent, up for the first time in 12 years.

INDUSTRY DIVERSIFICATION CREATES WIDENING PORTFOLIO OF MUSIC REVENUES

The music industry has developed a widening portfolio of revenue streams - including physical products, digital downloads, subscription services, ad-supported streaming, internet radio, public performance rights and synchronisation.

Global digital revenues rose by 4.3 per cent to US\$5.9 billion and now make up 39 per cent of total revenues, up from 36 per cent in 2012. Growth was fuelled by the continued global rollout of major digital services, rapid growth in subscription services, improving monetisation from ad-supported services, and continued growth of album downloads. Digital now accounts for the majority of revenue in eight of the world's top 20 markets including Australia, Canada, Denmark, India, Norway, South Korea, Sweden and the US.

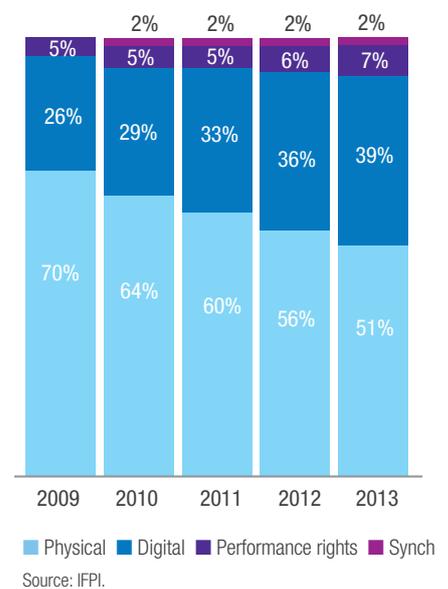
Music subscription services have been a crucial driver of digital growth - up 51.3 per cent in 2013, now making up for 19 per cent of digital revenues. The expansion of global services such as Spotify and Deezer, and growth of regional services such as Muve Music, WiMP, KKBOX and Beats Music, means that an estimated 28 million people now pay for a music subscription service. This helped revenues cross the US\$1 billion mark in 2013. Now the primary model for music in Sweden, Norway and South Korea, subscription also drove strong growth in markets such as the Netherlands and Denmark in 2013.

Downloads remain a substantial component of digital revenues, comprising 67 per cent of global digital revenues. While single-track sales are maturing in some major markets, digital album sales continue to grow worldwide. Established markets such as the UK continue to show growth, with growth rates particularly high in emerging markets. Ad-supported revenues increased significantly in 2013, up by 17.6 per cent and now making up 8 per cent of digital revenues, helped by strong demand and improving monetisation in YouTube in particular, with 13 new territories licensed in 2013.

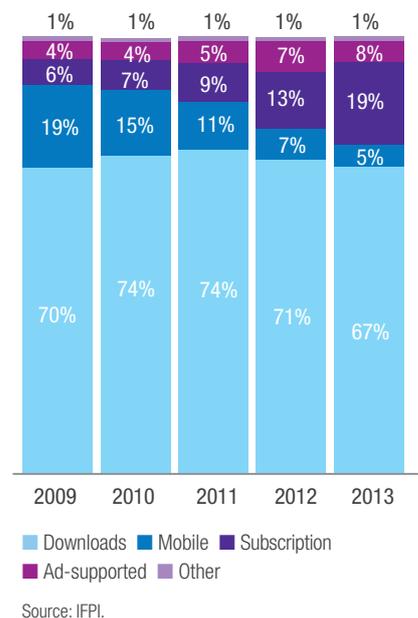
GLOBAL RECORDED MUSIC TRADE REVENUES (US\$ MILLIONS)			
	2012	2013	% change
Physical	8,753	7,730	-11.7%
Digital	5,630	5,872	4.3%
Performance rights	929	1,106	19.0%
Synchronisation	334	322	-3.4%
Total market	15,645	15,029	-3.9%

Source: IFPI.

GLOBAL RECORDED MUSIC REVENUES BY SECTOR (VALUE)



GLOBAL DIGITAL MUSIC REVENUES BY SECTOR (VALUE)





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Physical formats represented 51 per cent of global revenues, declining by 11.7 per cent in 2013. The rate of decline in physical format sales is slowing in major markets including the UK, Germany and the US. Deluxe sets and ‘domestic champion’ releases such as Daft Punk’s *Random Access Memories* helped CD sales grow by 0.8 per cent in France. Vinyl remains a niche, accounting for 1.5 per cent of global revenues, with healthy growth in the US and the UK in particular.

Outside physical sales and digital channels, performance rights revenue – income from the use of recorded music in broadcast, venues and internet radio – grew by 19.0 per cent and now accounts for 7 per cent of total revenues, passing US\$1 billion for the first time. Synchronisation revenues – income from the use of music in television programmes, films, games and advertising – fell by 3.4 per cent in 2013.

DIGITAL CHANNELS REACH MASS MARKETS IN LATIN AMERICA, ASIA AND AFRICA

Despite a continuing decline in CD sales – particularly in Brazil, the largest market in the Latin American continent, which declined overall – total revenues in Latin America grew by 1.4 per cent with digital income growing by 27.6 per cent, the fastest growing digital region in 2013. Over the last three years digital increased by 124 per cent, compared to a global average of 28 per cent.

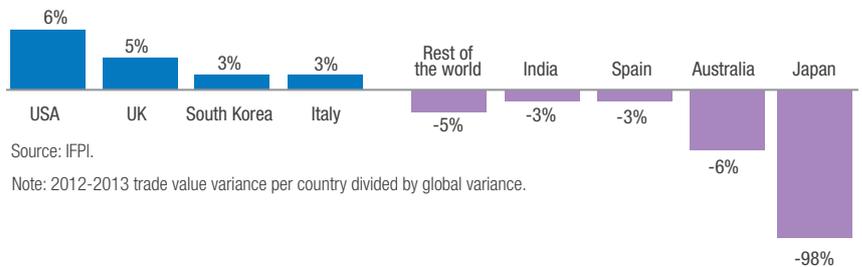
Meanwhile, Asia saw a drop in revenue of 14.6 per cent, heavily impacted by Japan which makes up 82 per cent per cent of the Asian region. Outside of Japan, South Korea - the second biggest market in the region - and Taiwan experienced digital growth of 32.0 per cent and 33.2 per cent respectively. India and China, which make up almost one third of the revenues in the region excluding Japan, also reported market declines in 2013.

In South Africa digital revenues grew by 106.8 per cent in 2013, driven by the successful market entry of international services like iTunes and Deezer as well as pan-African service THE KLEEK.

RECORDED MUSIC REVENUES – TOP 20 MARKETS SUMMARY (2013)								
	Country	Trade value			Market split (trade value)			
		US\$ (M)	Local currency (M)	% change	Physical	Digital	Perf. rights	Synch.
1	USA	4,473.5	4,473.5	0.8%	30%	60%	6%	4%
2	Japan	3,012.0	293,998.2	-16.7%	80%	16%	3%	1%
3	Germany	1,365.1	1,023.9	1.1%	73%	21%	6%	1%
4	UK	1,303.5	834.2	2.2%	44%	44%	10%	2%
5	France	956.2	717.1	1.3%	64%	23%	12%	2%
6	Australia	430.8	448.1	-8.4%	37%	54%	7%	2%
7	Canada	424.1	436.9	-2.5%	41%	50%	7%	2%
8	Italy	238.8	179.1	8.3%	56%	27%	15%	3%
9	Brazil	227.9	492.3	-1.7%	54%	34%	12%	1%
10	South Korea	211.3	232,249.4	9.7%	46%	51%	2%	0%
11	Netherlands	205.6	211,877.7	0.1%	49%	35%	15%	1%
12	Sweden	194.2	1,266.2	5.7%	21%	70%	8%	1%
13	Spain	150.7	113.0	-12.4%	48%	30%	22%	1%
14	Mexico	135.4	1,727.2	-4.4%	50%	47%	2%	1%
15	Norway	120.0	705.5	2.4%	21%	67%	11%	1%
16	Austria	119.7	89.8	-1.5%	65%	22%	13%	1%
17	Switzerland	115.6	107.5	-10.9%	56%	37%	8%	0%
18	Belgium	114.1	85.6	-9.6%	54%	27%	19%	1%
19	India	113.3	6,637.0	-15.9%	31%	60%	7%	2%
20	Denmark	95.0	534.0	4.7%	30%	55%	15%	0%
	Global	15,029.5		-3.9%	51%	39%	7%	2%

Source: IFPI.

COUNTRY CONTRIBUTION IN % TO GLOBAL CHANGE (2012 - 2013)



Source: IFPI.

Note: 2012-2013 trade value variance per country divided by global variance.

GLOBAL RECORDED MUSIC REVENUES 1997-2013 (US\$ BILLIONS)



■ Physical ■ Digital ■ Performance rights ■ Synch

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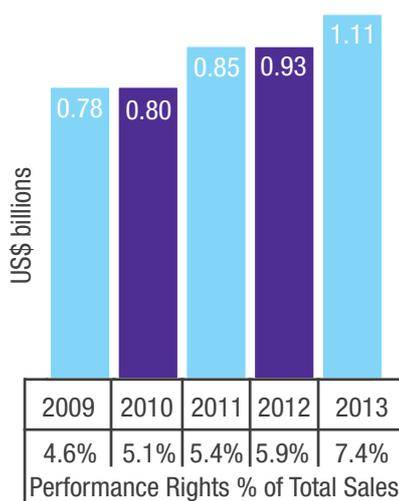
PERFORMANCE RIGHTS

INCOME CROSSES US\$1 BILLION THRESHOLD

Performance rights income globally increased by 19.0 per cent in 2013 to US\$1.1 billion and now accounts for 7 per cent of total industry revenues, up from 4 per cent five years ago and 2 per cent a decade ago.

This revenue stream – which includes payments collected for the use of music by broadcasters and by commercial third parties in public places such as bars, gyms, nightclubs, shops and restaurants – crossed the one billion dollar threshold for the first time in 2013. These commercial third parties pay for music which they use to attract and retain customers, drive consumer spending and motivate employees. The performance rights market reflects the role recorded music plays in driving a broader range of economic activity.

PERFORMANCE RIGHTS INCOME (TRADE VALUE) 2009-2013



The growth in global performance rights income was driven to a large extent by an increase in revenue from satellite radio and non-interactive streaming services in the **US**. This revenue is collected for artists and record companies by the music licensing company SoundExchange. While American performers and producers continue to lack a right to royalties when their music is played on analogue radio, the growth in digital radio helped drive a 65.3 per cent increase in performance rights revenue.

The performance rights market in the US is still underperforming, accounting for only 6 per cent of industry revenues, compared to 11 per cent in Europe. The industry continues to campaign for Congress to bring the US into line with most other markets worldwide and require its multi-billion dollar analogue radio industry – the world's largest – to pay for the music it uses to attract and retain listeners.

Performance rights income also increased sharply in **Latin America**, growing by 17.8 per cent in 2013. The industry received a major fillip from new agreements with broadcasters in Brazil and also continued its work to expand the coverage of music licensing companies across the region. Performance rights now account for 10 per cent of the total recorded music market in Latin America.

Major markets in **Europe** such as France, Germany and Italy saw an increase in performance rights collections. France benefited from improved tariffs while Germany and Italy were boosted by major back payments of levies.

Across the region, performance rights now account for 11 per cent of total recording industry revenues.

Asia saw an increase in performance rights of 4.6 per cent in 2013 as the recording industry worked to improve the infrastructure of music licensing companies, enabling them to collect more payments. However, the market is underdeveloped compared to Europe with performance rights income accounting for just 3.4 per cent of industry revenues. The industry has secured an extension of its rights in Singapore, while the Chinese government is reviewing its legislation in this area. There is much potential for growth across the region.

Africa also represents further growth potential for performance rights income, not having a fully developed performance rights licensing infrastructure yet. Effective performance rights licensing should help the local industries in particular to grow in the future.

In early 2014, Deloitte's *Technology, Media & Telecommunications Predictions 2014* report forecast the global performance rights market would be worth US\$2 billion within a few years, with growth driven by an increase in the number of businesses paying a performance rights licence, increased fees from broadcasters and a growth in the number of markets where revenues collected by music licensing companies. It concluded: "Music is everywhere. But its ubiquity is arguably under-monetised. For millions of businesses, music adds value."



MOST POPULAR ARTISTS AND GLOBAL BESTSELLERS OF 2013

IFPI compiles three global charts which highlight an industry that is continuously investing in new talent around the world and breaking acts to a global audience. They include artists from a range of countries including Barbados, Belgium, Canada, France, Germany, New Zealand, Sweden, the UK and the US. Artists at the top of the charts range from pop performers, such as One Direction and Katy Perry, to hip hop artists, such as Eminem and Jay-Z.

The way that the recording industry compiles its charts has changed over the last few years. Download sales now appear alongside physical format sales in the charts in virtually all markets worldwide and some now integrate streaming figures as well. In this section we produce album and singles charts, but also the newly-created IFPI Global Recording Artists Chart, which measures the success of artists across physical format sales, downloads and streaming. This multi-format chart reflects the portfolio nature of the modern recording industry.

GLOBAL BEST SELLING ALBUMS OF 2013

The bestselling album of 2013 was One Direction's third studio album *Midnight Memories*, which sold four million copies worldwide, also topping the charts in more than 80 countries. The UK/Irish band became the first group to debut at No. 1 on the US Billboard Top 200 with their first three albums.

The second spot was claimed by Eminem's eighth studio album *The Marshall Mathers LP 2*, which sold 3.8 million copies and topped the charts in Australia, Germany, the UK and the US. Justin Timberlake and Bruno Mars took positions three and four, with Daft Punk at number five.

The 2013 top 50 albums chart shows how music from around the world is playing on the world stage and features a number of non Anglo-American artists in addition to France's Daft Punk: an Italian (Andrea Bocelli), a Swede (Avicii), a German (Helene Fischer), a Belgian (Stromae) and a New Zealander (Lorde).

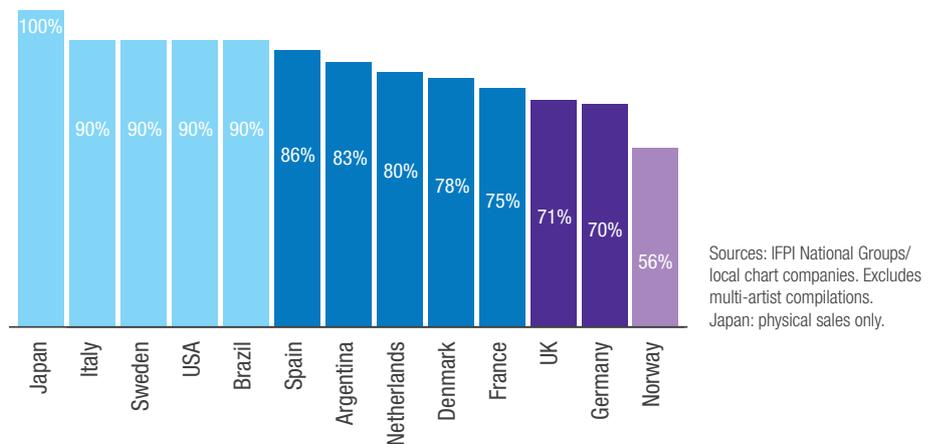
Thirty three of the top 50 albums were by solo artists, with a notable return for David Bowie with *The Next Day*, his first album in 10 years. Many US solo female artists featured in the top 50, including Katy Perry's *PRISM*, Lady Gaga's *ARTPOP*, Beyoncé's *Beyoncé*, P!nk's

The Truth About Love and Miley Cyrus's *Bangerz*.

Beyoncé's self-titled fifth studio album broke conventions with the surprise release of a 'visual' album, including a music video for each track and three bonus videos, selling 800,000 copies in its first three days of release.

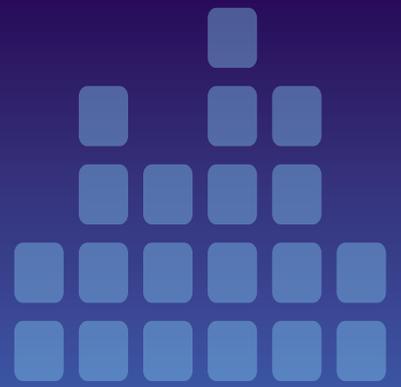
Local markets tended to be dominated by domestic repertoire: the chart below shows the percentage of top 10 albums in 2013 from locally signed artists.

% OF LOCAL ACTS IN THE NATIONAL TOP 10 ALBUMS OF 2013 (BY ARTIST NATIONALITY)



Daft Punk. Photo by David Black





GLOBAL TOP 50 ALBUMS OF 2013

	Artist	Album Title	Total (m units)	Company
1	One Direction	Midnight Memories	4.0	Sony
2	Eminem	The Marshall Mathers LP 2	3.8	Universal
3	Justin Timberlake	The 20/20 Experience	3.6	Sony
4	Bruno Mars	Unorthodox Jukebox	3.2	Warner
5	Daft Punk	Random Access Memories	3.2	Sony
6	Katy Perry	PRISM	2.8	Universal
7	Michael Bublé	To Be Loved	2.4	Warner
8	Imagine Dragons	Night Visions	2.4	Universal
9	Lady Gaga	ARTPOP	2.3	Universal
10	Beyoncé	Beyoncé	2.3	Sony
11	P!nk	The Truth About Love	2.2	Sony
12	Drake	Nothing Was The Same	2.0	Universal
13	Mumford & Sons	Babel	1.8	Universal/Glassnote/Sony
14	Luke Bryan	Crash My Party	1.8	Universal
15	Macklemore & Ryan Lewis	The Heist	1.8	Warner
16	Stromae	Racine Carrée	1.8	Universal
17	Adele	21	1.7	* XL Recordings
18	Robbie Williams	Swings Both Ways	1.6	Universal
19	Justin Bieber	Believe	1.6	Universal
20	Miley Cyrus	Bangerz	1.6	Sony
21	Justin Timberlake	The 20/20 Experience - 2 of 2	1.6	Sony
22	Jay-Z	Magna Carta... Holy Grail	1.5	Roc Nation/Universal
23	The Robertsons	Duck The Halls: A Robertson Family Christmas	1.5	Universal
24	Kanye West	Yeezus	1.5	Universal
25	Céline Dion	Loved Me Back to Life	1.5	Sony
26	Various Artists	Les Misérables: Highlights From The Motion Picture Soundtrack	1.4	Universal
27	Various Artists	Now That's What I Call Music! 86	1.4	Universal/Sony
28	Lorde	Pure Heroine	1.4	Universal
29	Florida Georgia Line	Here's To The Good Times	1.4	Universal
30	One Direction	Take Me Home	1.4	Sony
31	Kelly Clarkson	Wrapped In Red	1.3	Sony
32	Blake Shelton	Based on a True Story...	1.3	Warner
33	Emeli Sandé	Our Version of Events	1.2	Universal
34	Robin Thicke	Blurred Lines	1.2	Universal
35	David Bowie	The Next Day	1.2	Sony
36	Black Sabbath	13	1.1	Universal
37	Depeche Mode	Delta Machine	1.1	Sony
38	Various Artists	Pitch Perfect Soundtrack	1.0	Universal
39	Various Artists	Music From Baz Luhrmann's Film The Great Gatsby	1.0	Universal
40	One Direction	Up All Night	1.0	Sony
41	Bastille	Bad Blood	1.0	Universal
42	Rod Stewart	Time	1.0	Universal
43	Helene Fischer	Farbenspiel	1.0	Universal
44	Ellie Goulding	Halcyon	1.0	Universal
45	Andrea Bocelli	Passione	1.0	Universal
46	Avicii	True	0.9	Universal
47	Rihanna	Unapologetic	0.9	Universal
48	Arcade Fire	Reflektor	0.9	Universal
49	Olly Murs	Right Place Right Time	0.9	Sony
50	Kings Of Leon	Mechanical Bull	0.9	Sony



Eminem. Photo courtesy of UMG



Michael Bublé. Photo courtesy of Warner Music



P!nk. Photo by Andrew Macpherson

Source: IFPI. Physical and digital albums included.

* XL Recordings/Sony Music for the USA and Latin America



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GLOBAL TOP DIGITAL SINGLES OF 2013

For the first time, IFPI's top global singles chart included streaming, reflecting the growing popularity of the format. Streaming – either through on-demand subscriptions (paid and ad-supported) or video streams of official music video content, was measured by track equivalents (which aggregates multiple streams into an equivalent of one download single track). In total, the top 10 singles accounted for 101 million track equivalent copies.

The chart heavily featured artists working with collaborators and guest vocalists. *Blurred Lines* by Robin Thicke topped the chart with units or track equivalents of 14.8 million. The single, featuring T.I. and Pharrell Williams, received wide radio airplay, breaking records for the highest radio audiences reached. The song reached number one in 80 countries and, as with many recent global hits, was helped by its video - which attracted more than 200 million views on YouTube.

Macklemore & Ryan Lewis' *Thrift Shop* featuring the vocalist Wanz, was a track that struck a chord with young audiences around the world. The song reached number one in Australia, the UK and the US, receiving more than 500 million YouTube views.

Swedish DJ Avicii reached number three with *Wake Me Up*, achieving the equivalent of 11.1 million units. Known for fusing traditional music genres with electronic dance and techno, Avicii collaborated with R&B soul singer Aloe Blacc for this song, which reached number one in 23 countries.

Bruno Mars, Katy Perry, Macklemore & Ryan Lewis, Daft Punk, P!nk and Rihanna were the six artists who featured across all three charts, Top Singles, Top Albums and the IFPI Global Recording Artist Chart.



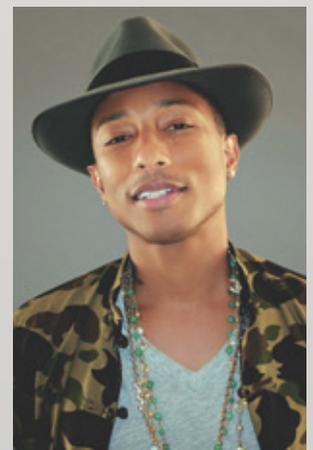
Robin Thicke. Photo by Terry Richardson



GLOBAL TOP SELLING DIGITAL SINGLES OF 2013

Rank	Artist	Title	Total (m units)
1	Robin Thicke feat. T.I. and Pharrell	Blurred Lines	14.8
2	Macklemore & Ryan Lewis feat. Wanz	Thrift Shop	13.4
3	Avicii	Wake Me Up	11.1
4	P!nk feat. Nate Ruess	Just Give Me a Reason	9.9
5	Katy Perry	Roar	9.9
6	Daft Punk feat. Pharrell Williams and Nile Rodgers	Get Lucky	9.3
7	Imagine Dragons	Radioactive	8.6
8	Bruno Mars	When I Was Your Man	8.3
9	will.i.am feat. Britney Spears	Scream & Shout	8.1
10	Rihanna	Stay	7.9

Source: IFPI. Units include single-track downloads and track-equivalent streams.



IFPI GLOBAL RECORDING ARTIST OF THE YEAR

One Direction were named the IFPI Global Recording Artists of 2013, receiving the newly-created award honouring the most popular recording artist globally, across all music formats. The award was introduced in 2014 to reflect the diversification of music channels available to artists.

The Global Recording Artist Chart takes into account the full catalogue of each artist. It includes albums, music DVDs, singles, free and paid-for audio streams and streams of official music videos on platforms like YouTube and Vevo, of new music but also older releases by the artist. The Chart reflects "track and album equivalents" which incorporate each of the formats and channels. These are arrived at using conversion rates between albums and singles and between track downloads and streams, reflecting estimated average levels of consumption of streams relative to downloads.

A number of big releases drove One Direction's success. As well as having the top-selling album of the year with *Midnight Memories*, their previous album *Take Me Home* was also in the best-selling albums list at number 30, selling an additional 1.4 million copies in 2013 after its release in 2012. *Midnight Memories* also contained the global hit singles *Best Song Ever* and *Story of My Life*.

The UK-Irish band are also well known for their digital presence, having been heavily promoted through digital platforms when first breaking into the US. *Best Song Ever* attracted more than 200 million views on YouTube with *Story of My Life* also recording over 100 million views. The band's music was also heavily streamed on services such as Deezer and Spotify.

With the notable exception of the top spot, the top 10 list of global recording artists was dominated by solo artists similar to the top 50 album chart. Eminem took the second spot, driven by the success of his album *The Marshall Mathers LP 2*, which featured the global hits *Berzerk* and *The Monster*.

The third spot on the chart was taken by Justin Timberlake on the back of his *The 20/20 Experience* album and its hit singles *Mirrors*, *Suit & Tie* and *Take Back the Night*.

Aside from the top three positions, Bruno Mars, Katy Perry, Daft Punk and Michael Bublé were among the top 10 in both the Global Recording Artists Charts as well as among the top 10 in the global top 50 albums, underlining the continued popularity of the album format.



Macklemore & Ryan Lewis. Photo by John Keatley



Bruno Mars. Photo by Kai Z Feng



TOP 10 GLOBAL RECORDING ARTISTS 2013

	Artists
1	One Direction
2	Eminem
3	Justin Timberlake
4	Bruno Mars
5	Katy Perry
6	P!nk
7	Macklemore & Ryan Lewis
8	Rihanna
9	Michael Bublé
10	Daft Punk

Source: IFPI. Independently verified by BDO LLP.



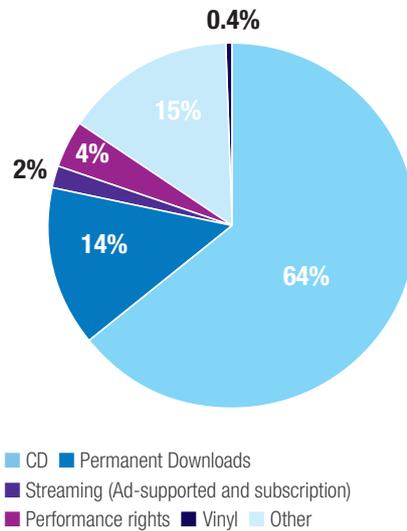
One Direction. Photo courtesy of Sony Music.

DIVERSIFICATION IN THE MARKET: MUSIC AS A PORTFOLIO BUSINESS

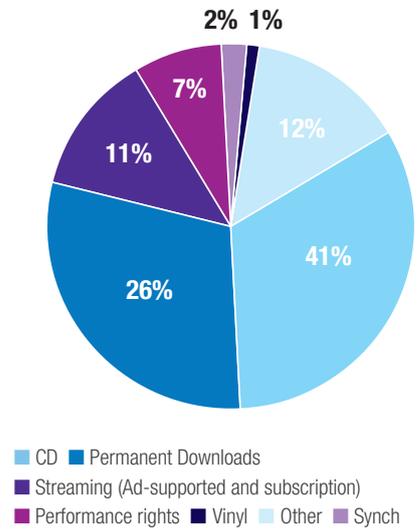
For the music business the advent of digital has meant diversification from an industry of one or two dominant revenue streams into one of many diverse business models. Global recorded music revenues are made up of CD, and vinyl, download sales, audio and video streaming income, performance rights income and synchronisation revenue.

The make-up of the industry's global income has changed considerably over the past five years, with downloads, streaming, performance rights and vinyl all increasing their proportion of total trade revenue to record companies as CD sales have fallen.

GLOBAL REVENUES BY SOURCE 2008



GLOBAL REVENUES BY SOURCE 2013



MUSIC SUBSCRIPTIONS ENTER THE MAINSTREAM

Subscription was the fastest-growing single revenue stream, up 51.3 per cent in 2013, passing the US\$1billion mark for the first time. Sharp year-on-year growth has seen the model enter the mainstream, now accounting for 19 per cent of digital revenues. The number of paying subscribers worldwide grew by 40 per cent in 2013 and now stands at an estimated 28 million, up from just eight million in 2010.

Growth is driven by a number of factors. First, the continued international expansion of global and local services such as Spotify, Deezer, KKBOX and THE KLEEK; second, the availability of services on mobile devices supported by the growth of smartphones, tablets and bundling - marketing music services in partnership with telecoms companies; and third, product improvements and feature enhancements to existing services, leading to increased awareness and adoption by consumers.

Subscription services have permanently changed the way many consumers access, enjoy and pay for music. In the last two years, streaming services have improved the user experience they offer

by investing in music discovery tools, as well as improving their functionality across a range of devices as competition in the market increases.

Subscription services have helped create a vast pool of new and potential future customers, complementing download stores with a regular subscription payment model.

The streaming payment model is radically different from download sales in the way it generates revenues for rights holders. A download is paid for just once, regardless of how many times it is listened to. With subscription services, a streamed track may be listened to by an individual hundreds of times, each triggering a micropayment, which can cumulatively exceed a one-off download payment. Premium subscribers pay a monthly regular fee for unlimited use of the service.

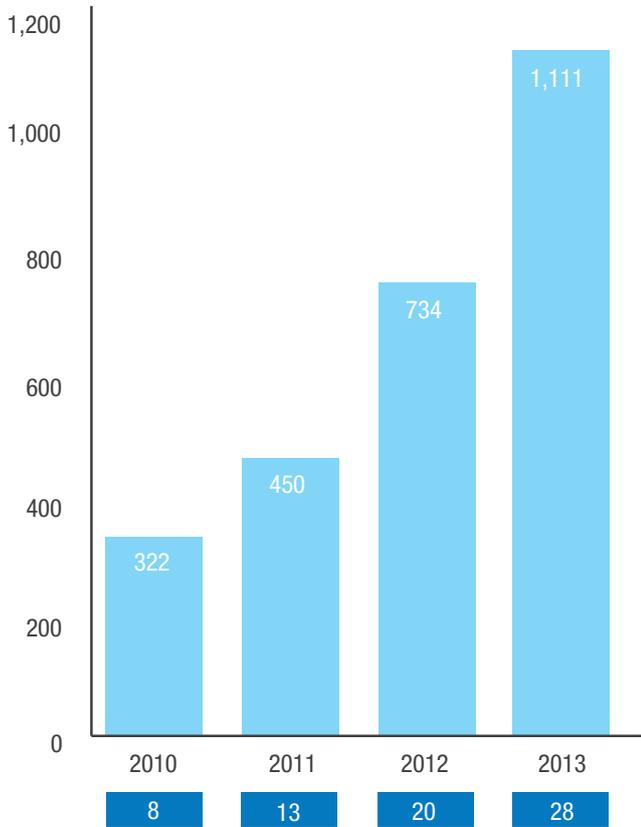
Subscription has helped transform markets, particularly in Scandinavia, starting in Sweden and Norway, before moving into Denmark and the Netherlands.

Subscription services now account for the majority of digital music revenues in Sweden (94%), South Korea (85%), Croatia (84%), Norway (84%), Finland (77%), Taiwan (75%), Iceland (67%), Hong Kong (56%) and the Netherlands (54%).

Many major markets are experiencing rapid growth in subscription streams revenue, including the UK (+37.3%), the US (+65.4%), Germany (+105.8%) and Italy (+177.6%).

The proportion of subscribers that pay, as opposed to being only free users, varies markedly by country. Sweden, an early-adopter subscription market has a high proportion of paying subscribers. In other countries, with lower paying subscriber numbers, services are building up their user bases and then looking to convert them to the paid tier.

SUBSCRIPTION STREAMS REVENUE GROWTH (2010-2013)

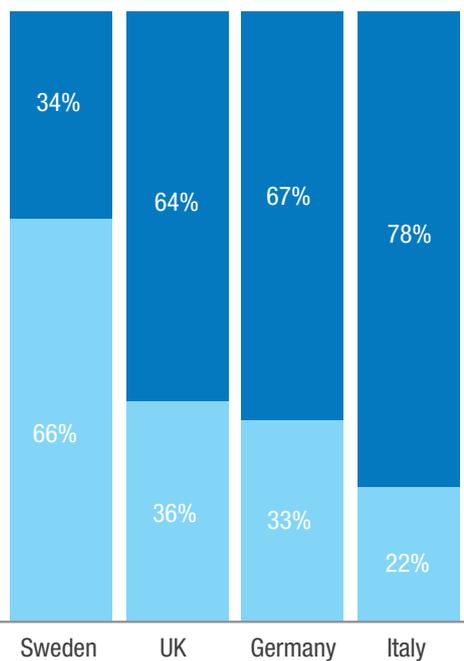


■ Subscription streams revenue (US \$ millions) ■ Number of paying subscribers (in millions)



will.i.am. Photo by The Bridge

MUSIC SUBSCRIPTION SERVICES - PAID VERSUS FREE USAGE



■ Paid ■ Free only

Base: All survey respondents using audio streaming services.
Source: Ipsos MediaCT

“THE RECORDING INDUSTRY HAS BECOME A PORTFOLIO BUSINESS, OFFERING AN ARRAY OF PRODUCTS FOR THE CONSUMER AT DIFFERENT PRICE POINTS, FROM VINYL AND CDS, TO DOWNLOADS, STREAMING AND SUBSCRIPTION. WE ARE OPTIMISTIC ABOUT THE PROSPECTS FOR FUTURE GROWTH.”

MAX HOLE, CHAIRMAN AND CEO, UNIVERSAL MUSIC GROUP INTERNATIONAL

“IF YOU LOOK AT SCANDINAVIA OVER THE LAST FOUR OR FIVE YEARS, YOU CAN SEE WHAT HAPPENS WHEN STREAMING GETS TO BE 40 OR 50 PER CENT OF OUR BUSINESS – THE MARKET STARTS SHOWING CONSISTENT GROWTH.”

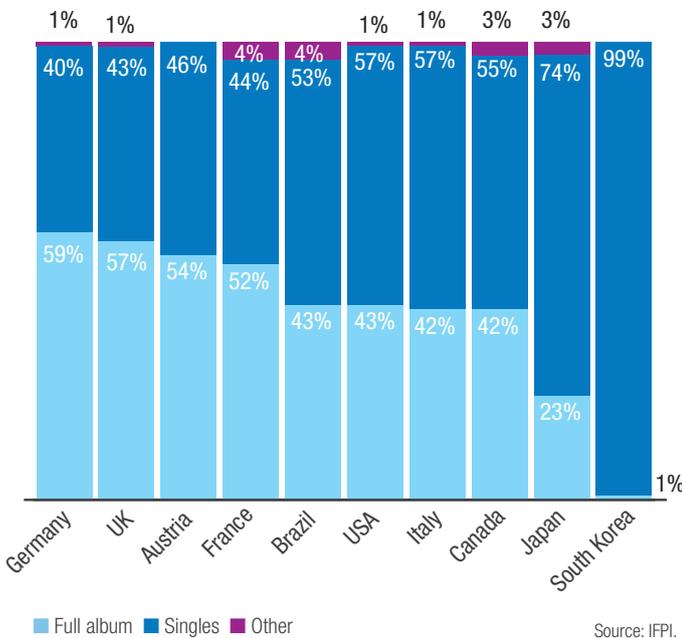
DENNIS KOOKER, PRESIDENT, GLOBAL DIGITAL BUSINESS AND US SALES, SONY MUSIC ENTERTAINMENT

DOWNLOADS REMAIN A KEY FORMAT

Downloads remain the digital music format that generates the greatest revenue, dominating certain digital markets including Australia, Canada, Germany, Japan, the UK and the US and make up a growing segment in markets such as Brazil and Mexico.

Downloads account for two thirds of the global digital music market but declined slightly in 2013, by 2.1 per cent, though this was more than offset in most markets by growth in other digital formats, such as subscription and ad-supported services.

% DOWNLOAD SALES MADE UP OF WHOLE ALBUMS (BY VALUE) 2013



In their early years, download stores helped transform sales of singles, reviving a format which had declined steadily in the physical world. Now the trend in downloads has shifted towards growth in album sales.

Whole albums make up 43 per cent of global download sales, with the proportion varying by market, from 59 per cent in Germany and 57 per cent in the UK, to 23 per cent in Japan and just 1 per cent in South Korea.

In established markets, such as the UK and Canada, download sales grew by 7.6 per cent and 7.7 per cent in value respectively and there was rapid growth in emerging markets such as South Africa (+458.8%), India (+158.7%) and Mexico (+11.3%).

iTunes Music Store, which first launched in 2003, expanded its reach to 119 countries after launching in 56 new markets in late 2012, with many countries seeing the impact of those launches in 2013.

Download sales have also benefited from cloud technology. Retailers including Amazon, iTunes and Google Play offer cloud services that allow consumers to listen to their music collections on any compatible device, using a 'scan & match' feature. These services scan music libraries on the user's computer to identify tracks that have been legally downloaded or added from purchased CDs, matching them to tracks on the service's cloud servers. These tracks are then available for the user to stream on demand to any compatible device – blurring the lines between the concept of 'ownership' and 'access', offering the consumer a hybrid model.

Google Play Music All Access and Microsoft's Xbox Music are examples of full hybrid models offering downloads, streaming and cloud storage.

DOWNLOADS IN EUROPE AND NORTH AMERICA (BY VALUE US\$, FIGURES IN MILLIONS)

		Total downloads		
		2012	2013	% Change
1	USA	2,082.7	2,040.8	-2.0%
2	UK	412.2	443.4	7.6%
3	Germany	227.4	229.2	0.8%
4	Canada	167.8	180.7	7.7%
5	France	119.3	118.2	-0.9%
6	Italy	35.9	38.2	6.3%

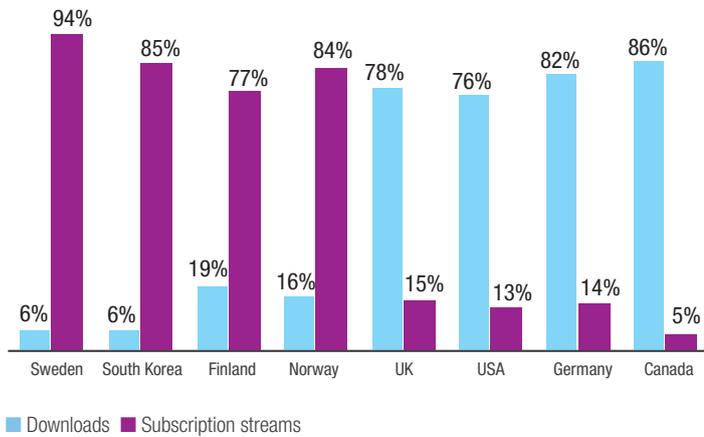
Source: IFPI.

DOWNLOADS IN EMERGING MARKETS (BY VALUE US\$, FIGURES IN MILLIONS)

		Total downloads		
		2012	2013	% Change
1	Mexico	36.7	40.9	11.3%
2	Brazil	15.0	25.6	71.3%
3	Russia	1.6	14.3	805.2%
4	South Africa	0.9	5.3	458.8%
5	China	4.6	4.4	-2.4%
6	India	1.0	2.5	158.7%

Source: IFPI.

DOWNLOADS AND SUBSCRIPTION STREAMS REVENUE AS A % OF TOTAL DIGITAL REVENUES (2013)



Source: IFPI. Downloads and subscription streams are shown as a proportion of total digital sales (including all digital formats) for each territory.

“MUSIC IS DEFINING THE FUTURE OF DIGITAL ENTERTAINMENT AND ITS EVOLUTION IS MOVING INTO A NEW PHASE AS CONSUMERS EMBRACE STREAMING AND SUBSCRIPTION MODELS IN MARKETS AROUND THE WORLD.”

EDGAR BERGER, CHAIRMAN AND CEO, INTERNATIONAL, SONY MUSIC ENTERTAINMENT

“THERE HAVE BEEN SIGNIFICANT STEPS IN THE LAST 18 MONTHS TO DEVELOP, PROMOTE AND GROW THE ACCESS BASED ECOSYSTEM. AS CONSUMERS ARE MAKING THAT TRANSITION, THERE ARE A LOT OF VERY HIGH QUALITY SERVICES AVAILABLE TO THEM.”

STEPHEN BRYAN, EXECUTIVE VICE PRESIDENT, DIGITAL STRATEGY AND BUSINESS DEVELOPMENT, WARNER MUSIC GROUP

THE DIVERSE APPEAL OF DOWNLOAD STORES AND STREAMING SERVICES

IFPI commissioned consumer research from Ipsos MediaCT to get a better understanding of how consumers worldwide are engaging with licensed digital music services. The results show that there are distinct groups of consumers who use either only download or only streaming services, as well as a third group that engage with both. Each of these groups account for around one-third of all those using licensed services. This picture has been stable for the past two years and indicates distinct segments of consumers, each with different preferences.

Different music markets are dominated by varying types of digital services. In countries such as Canada, Germany, the UK and the US, downloads dominate the digital sector making up more than three quarters of digital revenues, whereas in markets, such as Finland, Norway, South Korea and Sweden, a much greater proportion of revenue can be attributed to streaming services.

Ipsos MediaCT found that the motivation of consumers using download stores is different from those accessing streaming services. Unsurprisingly, ownership is important to download store customers, with 40 per cent saying they “prefer to download than stream” when explaining why they use such services. Conversely, 37 per cent of streaming service customers say they use those services because they want to “listen to music without having to purchase each song.”



CD DECLINE SLOWING IN MAJOR MARKETS WITH MANY PREFERRING THE PHYSICAL FORMAT

The CD has proven to be a more durable format than many would have expected. Although CDs continue to experience a long-term decline in sales, they still appeal to a significant proportion of music fans. In 2013, physical format sales fell globally by 11.7 per cent. In France, physical sales even increased as high-profile releases helped drive CD purchasing. In Germany, Italy and the UK decline slowed down compared to previous years, decreasing by 1.5 per cent (Germany), 6.4 per cent (UK) and 4.8 per cent (Italy).

The security and ‘guarantee’ of a physical product, the desire to build a physical music collection, the browsing appeal of a “bricks and mortar” retail experience and the ability to ‘sideload’ CDs into music libraries has helped the durability of the format.

CDs are also seeing new innovations, popular among a higher end group of consumers. These include special edition box sets aimed at the music collector such as *The Beatles Live at the BBC*, Fleetwood Mac *Rumours* 35th anniversary edition and Nirvana *In Utero* deluxe edition.

The physical market can also be boosted in individual markets by high profile releases. In 2013, the success of Daft Punk’s *Random Access Memories* helped lift the physical market in France by 0.8 per cent. In Germany, the decline in the physical market was arrested to 1.5 per cent, compared to a global average of 11.7 per cent, in part because of the success of local repertoire such as Helene Fischer’s *Farbenspiel*, an album in the traditional Schlager (country) genre.

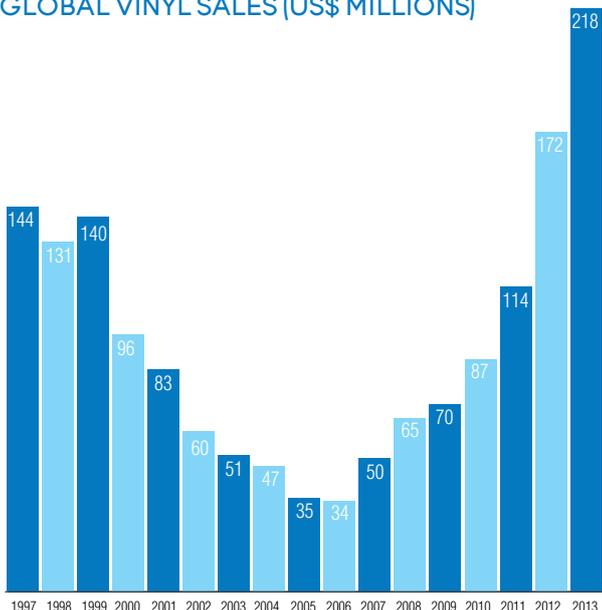
THE RESURGENCE OF VINYL

Vinyl accounts for 1.5 per cent of the recording industry’s global revenues, but has a special place in the heart of music aficionados. In 2013, global sales of the format increased by 26.9 per cent, rising from US\$172 million in 2012 to US\$218 million.

In the US, sales of vinyl LPs increased from 4.6 million units in 2012 to six million units in 2013, meaning that vinyl represents 2 per cent of all album sales in the US (Nielsen Soundscan). In the UK, vinyl sales increased by 49 per cent in value in 2013 to £12.1 million, the highest level of annual income for the format since 1995 (BPI). Australia has also seen vinyl sales increase, with ARIA announcing an increase of almost 77 per cent in sales volumes in 2013.



GLOBAL VINYL SALES (US\$ MILLIONS)



Source: IFPI.

A number of reasons have been suggested for the resurgence of vinyl. First, it remains the physical format best suited to providing added value to music fans in the form of artwork and extensive liner notes. Record companies have developed super-deluxe box sets as premium products, often built around vinyl releases, to appeal to collectors. Second, a number of music fans say they value the “warmer” sound quality of vinyl. Third, vinyl has undoubtedly won support from some younger consumers as a fashionable alternative to the ubiquity of digital music.

Another factor that may have helped increase vinyl sales in recent years has been the growth of Record Store Day, celebrated internationally each year in April. The movement was founded in 2007 and has grown to include thousands of independent record stores around the world. It is backed by many artists and record labels, some of whom even produce special vinyl and CD releases to mark the occasion.

MUSIC VIDEO MONETISED IN MORE WAYS

Music video is a growing source of income in the digital market, funded largely by advertising. Advertising-supported revenue from video platforms increased by 17.6 per cent in 2013 to US\$472m.

The two principal platforms for music video are Vevo, specialising in music content, and YouTube. Consumption of music video on these platforms continues to grow. Music videos account for nine in 10 of the most watched videos in YouTube's history, with PSY's *Gangnam Style* topping the charts with more than 1.9 billion views.

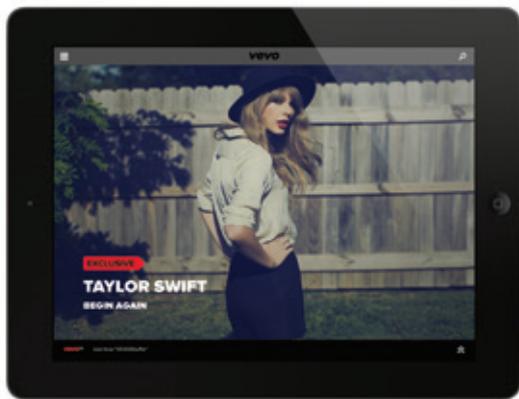
Both services are improving the way they monetise the content hosted on their platforms, with adverts placed against the videos shown. Both platforms have become more adept at selling premium-quality targeted advertising for a higher rate as they deliver ever-increasing audiences.



YouTube is also increasingly successful at monetising both professionally produced video and user generated content. Its ContentID system has made it easier for rights holders to differentiate between video types, allowing the streaming of user generated content such as mash-ups and lip-syncs to be monetised.

New advertising formats and improved tools, such as TrueView, which allows user to skip pre-roll ads after five seconds or select which ads appear during breaks in the longer video they are watching, have helped increase the amount of revenue generated for rights holders from the platform.

The growth of YouTube's the Multi-Channel-Networks (MCNs), which enable different video aggregators to create their own branded music video channels, has had a major impact. Channels such as SBTU and UKF Dubstep, the latter rapidly approaching five million subscribers, and Turkish music industry channel MÜYAP, have proved that creating well-curated on-demand video channels can reach huge audiences.



"WE CAN MONETISE IN ALL THE MARKETS WHERE YOUTUBE HAS DEALS IN PLACE WITH RIGHTS HOLDERS AND A VIABLE ADVERTISING BUSINESS. IT'S THE FIRST TIME WE'VE EVER HAD A GLOBAL RETAIL PARTNER IN MORE THAN 200 MARKETS."

ROB WELLS, PRESIDENT OF GLOBAL DIGITAL BUSINESS, UNIVERSAL MUSIC GROUP



Katy Perry. Photo by Cass Bird

KEY DIGITAL MUSIC TRENDS 2013

Recorded music markets are highly diverse, with each national market shaped by different musical tastes, technological trends and consumer preferences. However, in 2013 there were some distinct global trends which impacted on recorded music revenues. Excluding Japan the overall market saw stabilisation, with increased digital revenues making up for the continued decline in physical formats in most major markets. Within the digital business however, consumption patterns are changing as 'access' models of subscription and ad-supported streaming grow in popularity alongside download and hybrid models and as music services become available across platforms and devices.

1. MUSIC'S INCREASING REACH: STREAMING AND SUBSCRIPTION HELP DRIVE ACCESS TO DIGITAL SERVICES FOR MILLIONS

The overriding trend in recorded music has been its growing reach. The spread of licensed services, in particular internet radio, free on-demand services and paid premium subscriptions – has seen music reach more people than ever before, allowing them to discover new music in convenient and affordable ways.

IFPI commissioned global research from Ipsos MediaCT across ten countries which found that more than 60 per cent of people aged 16-64 with internet access had used a licensed digital music service during the previous six months.

There are some 450 individual services available globally, with many new service roll-outs in 2013 driven by the global expansion of services such as Deezer, iTunes and Spotify and the licensing of YouTube in 13 further territories. Whereas in 2010 international services were present in just over 20 markets, today they are present in more than 150 countries.

Spotify launched in a further 38 countries in 2013, bringing the total number of markets it operates in to 55. Having focused expansion on Latin America and Asia, the service is expected to launch in Japan soon. Deezer, now available in over 180 countries, is expected to launch in the US in 2014. Deezer has 25 telco partnerships worldwide, reaching millions of customers. In March 2014, Nokia announced it was bringing MixRadio to China, becoming the first global company to launch a streaming service in the country.

Local services have also expanded, with KKBOX extending its reach from its home base of Taiwan to other Asian countries such as Hong Kong and Malaysia, while African service THE KLEEK spread across the continent. iTunes, which first launched in 2003, is now available in 119 countries. Google Play expanded from six to 21 markets in 2013, becoming one of the fastest growing download stores in the process.

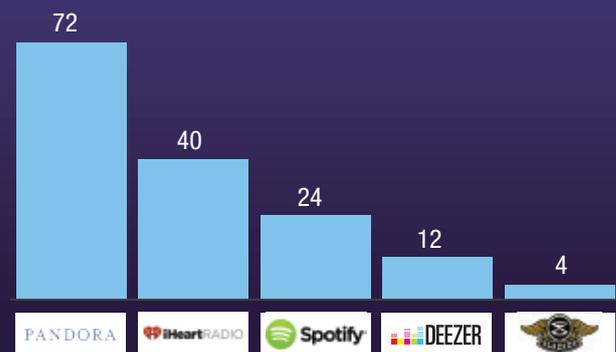
Use of Vevo increased substantially in 2013, with the number of video views increasing by 33 per cent to 55 billion, partly fuelled by increased take-up of the service on smartphones and tablets. In 2013, nearly a third of Vevo's video views were made using a smartphone, tablet or connected TV, with this proportion increasing to 60 per cent in the US.



GLOBAL DRIVE FOR ACTIVE USERS

A key metric to measure usage of licensed digital music services is 'active users' – people who use services frequently. Available data indicates that once consumers are familiar with subscription services, they use them regularly, and for these services the goal is to keep users active, engaged and 'upsell' them to premium tiers. Spotify announced in March 2013 that it had 24 million people using the service monthly, an increase of four million in three months. In December 2013, Deezer announced it had 12 million active monthly users and in February 2014 internet radio service Pandora announced that it had 72 million active listeners.

USERS OF MAJOR MUSIC STREAMING SERVICES (MILLIONS)



Source: Company announcements dated as shown: Pandora Dec 13, iHeartRadio (registered users) Nov 13, Spotify Mar 13, Deezer Dec 13, Slacker Mar 13.

Active usage is being driven in particular by the spread of advertising-supported free streaming and internet radio services. These offer consumers easy access to a vast range of repertoire, with the ability to discover new music and personalise their listening. They provide an alternative to unlicensed music services. These free-to-use services also provide consumers with the opportunity to trial a service - a stepping stone before deciding to upgrade to a premium option which may include features such as ad-free music, better playlisting options, greater mobility, offline options and value-added features such as discovery apps and links with external playlist sources.

With more than one billion users, YouTube has a reach that is unrivalled by any other service. It was monetised in 13 additional countries in 2013 as publishing rights agreements in markets from Chile to Sweden triggered payments to all music rights holders.

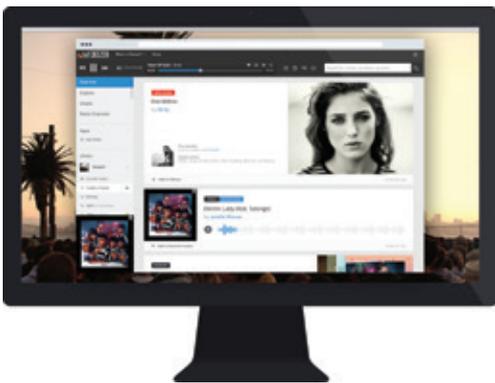
Additionally, increased connectivity and smartphone penetration is helping companies reach millions of new customers in emerging markets with little previous music retail infrastructure. In Latin America, for example, digital services and telecoms companies have signed new deals that enable consumers to bundle a music service with phone and data services. Examples of such tie-ups include Deezer and Tigo in Central America, Muve Music and TIM in Brazil and Napster and Terra across the Latin American region.

2. INNOVATION IN DIGITAL SERVICES – PERSONALISATION AND DISCOVERY CONTINUALLY IMPROVE THE MUSIC EXPERIENCE

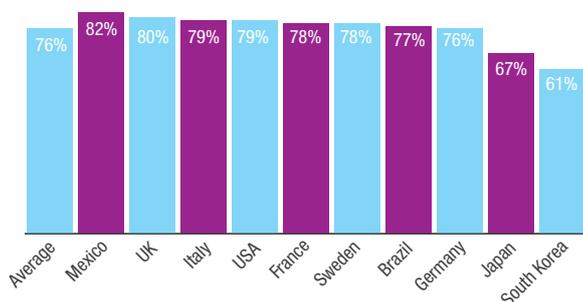
Digital music services are constantly working to improve the user experience they offer.

The creation of discovery features and the ability to build and share playlists, are helping drive consumer satisfaction with these services, making them an even more compelling alternative to unlicensed sites.

According to Ipsos MediaCT, more than three quarters of those using licensed digital services (including download stores, streaming services, internet radio and video streaming sites) rate them positively ('excellent'/'very good'/'fairly good').



AVERAGE RATING OF LEGAL DIGITAL SERVICES



Source: Ipsos MediaCT. Base: All using legal digital services (includes downloads, audio and video streaming services and internet radio)

Record companies have licensed more than 30 million tracks to digital music services. Digital services are working to help their users navigate their way through this vast catalogue to discover the type of music that will appeal to them. In 2013, Deezer launched 'Hear This' and Spotify created 'Discover' to offer an improved music discovery experience.

At the same time, in the US, Apple launched iTunes Radio, a personalised radio player that offers a music experience for the 'lean back' customer who may want to enjoy a selection of new music based on the repertoire they have previously enjoyed.

A number of apps have been developed to help consumers discover new music. These include Shuffler.fm, which aggregates music blogs and enables users to stream playlists based on bloggers' recommendations; BBC Playlist, which enables users in the UK to build playlists based on songs played on BBC radio stations; and Soundwave, which enables users to see and follow each others' social music habits. It is expected that this innovative and competitive marketplace will continue to expand throughout 2014.

Even within new business models, the music industry is experimenting with different price points and bundles opening up the market to new types of users.

Bloom.fm in the UK offers not just the choice between a premium unlimited service and the free version, but also offers two other price points focusing on smaller numbers of tracks for a lower subscription cost. O2 Tracks offers streaming of the top 40 and new releases for £1 per week and Psonar offers pay per play streams.

Beats Music users in the US can choose a family plan that lets users connect up to five family members and 10 devices. Muve Music offers daily or weekly pre-paid mobile subscriptions.

Similarly in India, Saregama offers four distinct membership plans, each focusing on different consumers and consumption amounts, and also different types of musical content and interests. In Brazil, imusica allows users to deposit credits into an account, which can be used to download music.

"IT'S ALWAYS BEEN OUR GOAL TO EMPOWER CONSUMER CHOICE WHEN PROMOTING – AND PROTECTING – OUR ARTISTS' CREATIVE WORKS. THE MOVE TO SMARTPHONES AND TABLETS IS JUST THE LATEST STEP IN THAT JOURNEY AS WE MAKE OUR REPERTOIRE AVAILABLE TO NUMEROUS PLATFORMS WITH DIFFERENT DIGITAL OFFERINGS AROUND THE WORLD THAT CATER FOR SMARTPHONE AND TABLET USERS."
STU BERGEN, PRESIDENT, INTERNATIONAL, WARNER RECORDED MUSIC

3. MUSIC GOES MULTI-DEVICE AND MULTI-PLATFORM: WHEN AND WHERE FANS WANT IT

A major recent development in the industry has been the shift in consumer behaviour towards listening to music on mobile and portable devices. This shift was underpinned by the worldwide growth in smartphones and tablets, with Swedish telco operator Ericsson reporting that at the end of 2013 there were more than 1.9 billion smartphones in operation.

Cloud-enabled download stores and streaming services allow consumers to access music across a range of devices so they can listen to it when and where they want to at the touch of a button. More consumers are now listening to music on laptops and smartphones than on hi-fi systems or dedicated portable music players.

Record companies have licensed their repertoire to services and applications (“apps”) that are available on a range of devices, including smartphones and tablets. Previously music services were often part of only one ecosystem, whereas now they are available across platforms such as iOS, Android, Windows, Mac and PC.

Spotify’s launch of a free mobile tier has been one of the key developments of 2013, providing listeners with a reduced music service on their phone without having to pay a subscription fee.



Deezer is now available in more than 180 markets worldwide. It has two customer bases; five million direct subscribers and in excess of 25 million

‘bundled’ customers through telco and ISP partnerships. Deezer places an emphasis on its editorial, curation and music discovery tools.

CEO Axel Dauchez says good editorial is vital to bring through new acts and meet the long-term needs of the consumer. “Just being a jukebox doesn’t help the artists or fans. In the long run you have no differentiation versus your competitors or piracy. You can’t thrive just by distributing music that people already know, you need to help them build their own musical identity by cracking the discovery process.”

Another priority for Deezer has been establishing partnerships with telecoms operators. Partnerships with 25 telcos worldwide including Dtac in Thailand, EE in the UK, Orange in France, Tigo in Latin America and T-Mobile in Eastern Europe have helped the company accelerate its growth.

Dauchez adds: “Telcos are the only way to quickly get to critical mass, and are a fantastic educator of the market. It’s a partnership. We don’t focus on what we can get out of them - we think about what we can do for them – helping them acquire new customers, giving them a sales incentive at retail, working with the marketing team. The right integration and marketing determines the quality of the partnership.”

The partnership has been beneficial for Deezer’s telco partners. For example, in France, Orange has indicated churn rate of up to 50 per cent lower for Deezer users when compared with its overall customer base.

“PEOPLE USED TO ENJOY MUSIC ON CD OR VINYL ALBUMS, THEY ENJOYED THE COVER ART AND THE SLEEVE NOTES WHICH ENRICHED THEIR UNDERSTANDING OF THE ARTIST. TO IMPROVE THE DISCOVERABILITY OF TRACKS IN THE DIGITAL WORLD WE NEED TO ENRICH THE CONTENT WITH CONTEXT. WE NEED TO BE ABLE TO TELL STORIES TO ENABLE PEOPLE TO DISCOVER MUSIC THAT THEY WOULD NEVER FIND BY THEMSELVES.”

AXEL DAUCHEZ, CEO, DEEZER

METADATA FUELS THE DISCOVERY PROCESS



Music discovery tools are underpinned by metadata – the information that identifies the music contained in a download file or digital stream. This data includes the name of an artist, song and album, but also other key information such as the songwriter

on a track, the record label that released it, country of origin and a wealth of other details that allows the file to be connected with other assets, such as artist images and song lyrics.

The collection and application of metadata is fuelling enhanced user experience around discovery, including the algorithms behind services such as Spotify’s ‘Discover’. Metadata is the specialism of a host of music technology companies such as Echo Nest, Gracenote, MusicBrainz and Shazam.

Digital services making application programme interfaces (APIs) available support the process by allowing other music services and music apps to access their metadata libraries.

This acts as a catalyst for developers working on new music apps, as they can link their technology to the key data they require for user functionality – such as lyrics and song searches.



The launch of Beats Music in January 2014 has led many to predict a bright future for US subscription. Together with an established parent brand, a user experience that offers a new take on music discovery and a 'family package' model built around a marketing partnership with AT&T, many believe Beats Music can achieve scale among mainstream American music fans.

While subscription services have been available in the US since 2005, the model is still largely regarded as a niche proposition in the US digital market.

Beats Music CEO, Ian Rogers, argues that with six million US consumers paying for subscription services, the model is some way off reaching its potential. "In terms of a subscription base we have 25 million people paying for satellite radio, 35 million people paying for Netflix and 67 million paying \$1,000 a year for cable. The challenge is getting people to pay for music the way that they pay for satellite radio, Netflix and cable."

Rogers says the partnership with AT&T, which has more than 100 million customers will have a major influence on achieving scale. The company has focused on developing family packages. "No one's cracked the US carrier market yet. There have been smaller promotions, but nothing like what Spotify did in the Nordics. The thing that is unique about the US is that the vast majority of customers are on family plans. So we're aggressively marketing a unique offer for the entire family."

Unlike many other subscription services, Beats Music does not offer a freemium tier, and believes its roots as an artist-oriented company focused on curation will provide a point of difference that encourages people to pay for a premium product: Beats aims to appeal to a mainstream music segment currently underserved by radio who want more than just access to unlimited music.

"WE'RE FOCUSED ON BUILDING A BETTER USER EXPERIENCE AND CONVINCING THE WORLD THAT STREAMING AND SUBSCRIPTION IS THE BEST WAY TO CONSUME MUSIC. THIS IS WHAT COMES AFTER DIGITAL DOWNLOADS."

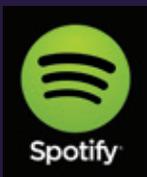
IAN ROGERS, CEO, BEATS MUSIC



ARTISTS INNOVATING WITH APPS

In 2013, there were some notable examples of artists innovatively using apps to present their music, video and related content. Perhaps the most notable example of this trend was Lady Gaga's ARTPOP app, released as a free download for both Android and iOS. The app promised a "visual engineering system that combines music, art, fashion and technology with a new interactive worldwide community - 'the auras'. The app presented users with a virtual turntable to play the album on (for fans who had purchased the album tracks) but more importantly provided Lady Gaga fans with an immersive world in which to play in.

Another key artist app in 2013 was Bob Dylan's The Bootleg Series app. Released for free on iOS, the app contains more than 500 pieces of content, including detailed timelines for each of the three dozen songs from the Self Portrait bootleg album release, interviews with some of the participants in the making of the original Self Portrait album and photo galleries.



Spotify continues to expand internationally, has introduced a swathe of product innovations and even begun to sell merchandise. At the end of 2013 the service was live in 55 markets and its monthly active user base increased to 24 million.

Ken Parks, the chief content officer and managing director USA, says: "This is the way people are consuming music. The debate over whether it's a model to embrace has been put to rest over the last year. Unlike the distribution of physical product we can reach every person on the planet with a smartphone. It opens up huge

opportunities in the developing world, where they have leapfrogged fixed line internet and gone straight to wireless."

A new 'Discover' page offers enhanced music recommendations, providing curation from partners including live concerts app Songkick and review site Pitchfork, while a 'Browse' page recommends a range of playlists for every occasion.

Parks adds: "Twenty million songs can be daunting so we've made it much easier for people to affiliate music with the kinds of things they like, to have great moments of discovery they might not otherwise be able to make."

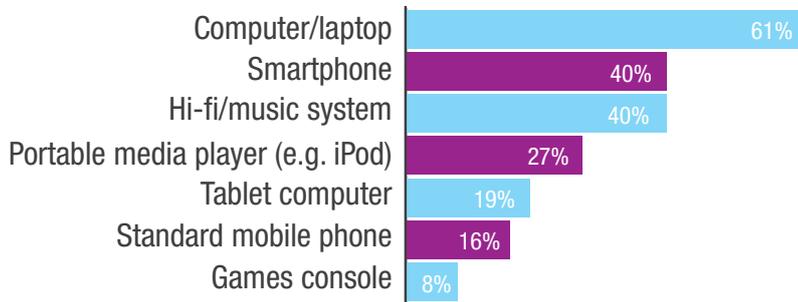
Spotify introduced a free mobile tier to its service in 2013. With smartphones

now a primary point of internet access for many people, the free mobile tier is expected to attract a greater number of users, drive more usage across the current Spotify free user base, as well as encourage more free users to subscribe to the full premium service.

"THE ABILITY TO REACH EVERY PERSON ON THE PLANET WITH A SMARTPHONE OPENS UP HUGE OPPORTUNITIES FOR MUSIC SERVICES IN THE DEVELOPING WORLD, WHERE MARKETS HAVE LEAPFROGGED FIXED LINE INTERNET CONNECTIONS AND GONE STRAIGHT TO WIRELESS."

KEN PARKS, CHIEF CONTENT OFFICER, SPOTIFY

PERCENTAGE OF INTERNET USERS USING DEVICES TO LISTEN TO MUSIC ONCE PER MONTH OR MORE (GLOBAL AVERAGE)



Source: Ipsos MediaCT.

Music apps have been driven by the dual increase in the penetration and use of smartphones and the use of apps for more generic uses. The market in music apps is rapidly growing. A recent study by the analysts IHS and App Annie reported that the growth in consumer spending on apps on the Android and iOS platforms in 2013 increased by 77 per cent, with music subscription accounting for four of the top 10 grossing music apps. However, the market was led by the music discovery apps Shazam and Soundhound.

With increasing penetration of smartphones, the growing availability of lower cost options and the access of music through ‘apps’ increasing, the trend of portable listening and consumer expectations of what they can do on their devices will continue to grow.

TELCO PARTNERSHIPS BRINGING ON-DEMAND STREAMING TO EVEN MORE CONSUMERS

One of the major drivers in the expanding reach of music streaming services has been their strategy of partnering with mobile operators. Telcos have always seen the value in providing music services to subscribers, but the arrival of streaming services represents a new opportunity for them. They can form partnerships with established music brands and use them in high-profile marketing campaigns to acquire new customers, or to convince existing users to move up to a higher tier tariff.

There has been a flurry of activity in telco and music service partnerships in the past year as mobile operators have looked to push the benefits of

4G and LTE services to both new and existing customers. These partnerships deliver for both mobile operators and streaming services. Music consultancy MIDiA produced a report in 2013, commissioned by Universal Music, which provided key insights into how these partnerships work. The report revealed that:

- There are nearly 50 telco music partnerships live across six different regions of the globe
- Music services have proven to be successful with consumers; 55 per cent of promotional offer music trial users convert to paid music subscriptions after one month
- Music services are emotive products that create customer satisfaction levels right across a telco’s business



VIEW FROM DELOITTE

SMARTPHONES AND TABLETS: OUTLOOK AND IMPLICATIONS FOR RECORDED MUSIC

The adoption of smartphones and tablets continues to rise globally and the capability of these devices should continue to rise year-on-year in the medium term. 2014 alone, we expect over 1.5 billion smartphones and tablets to be shipped.

Penetration rates for smartphones are reaching a plateau in developed markets, but smartphone owners, particularly in the 18-44 year old age group, are likely to continue upgrading their devices every couple of years or so. As a result sales for these devices should remain strong.

When a smartphone owner changes device, they typically acquire a device that is significantly superior to their old phone. Over time, the capability of the smartphone is expected to increasingly determine the way in which people use it. Use of music on smartphones is already high for streaming and music playback, but music use will become ubiquitous as

the functionality of smartphones increases, making standalone digital music players into a niche device. The use of music apps will also increase from current levels, on mobiles and other devices.

In many developing markets, smartphones remain in the minority. As lower cost devices become available, and as 3G networks launch or are extended throughout a territory, adoption of smartphones should increase.

In 2014, the modern tablet will turn four years old. The tablet market has diversified massively in recent years, including entry of lower-priced devices which has helped drive uptake. We are already in the era of the \$100 tablet, and \$50 tablets should become available in the short term.

The growing range of tablets available is leading to a diversifying ownership profile. Owners of the first tablets tended to be relatively prosperous, that is individuals who could afford a \$500 tablet in addition to a laptop computer. But owners of lower-priced compact tablets may be much less inclined to buy apps and downloadable content, but may be more interested in streaming services or benefitting from cloud services.

Over the next few years, growth in revenues from smartphones and tablets

is likely to slow. In 2014 global sales of smartphones and tablets are expected to be about \$475 billion, up \$60 billion from 2013 and three times higher than 2010 total when the first consumer tablets first started shipping.

However, in unit terms they are expected to continue to grow strongly over the next few years (see figure 2) with greater volume catalysed by a steady fall in prices. At the 2014 Mobile World Congress, the \$25 smartphone was launched, offering a similar specification to \$100 smartphones available in 2011.

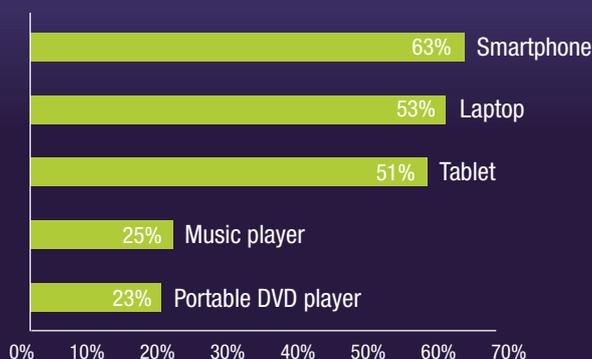
The growing base of connected devices means that there will be an increasing quantity of devices on which music can be played, music radio can be listened to, and music videos can be watched. Indeed we expect that portable connected devices will often be used in a way similar to FM radio sets. Connected devices can also be used to reinforce the value of recorded music, for example by offering recommendations on what to listen to next, or by offering information about the artist.

These devices also offer further opportunities to monetise music; as more games are played on devices, overall consumption of recorded music per user may increase.

Commentary supplied by Deloitte

FIGURE 1: PORTABLE DEVICES CONSUMERS MOST WANT TO PURCHASE (DEVELOPING MARKETS)

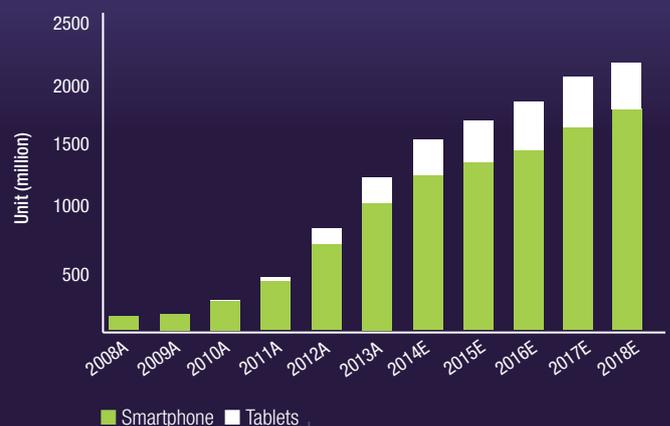
Respondents likely to buy a device in the next 12 months (Developing markets average)



Source: Deloitte Global Mobile Consumer Survey, Developing markets, May-July 2013
Weighted base: Argentina 2000, Brazil 2000, China 2000, India 2000, Indonesia 2000, Mexico 2000, Russia 2000, Turkey 1000

Note: Respondents that would like to buy a large smartphone in the next 12 months have been included in the overall smartphone number.

FIGURE 2: COMBINED GLOBAL SALES REVENUES OF SMARTPHONES AND TABLETS (2008-2018)



Source: Deloitte Analysis, 2014.

We've decided
to do it
differently.

Maybe we're
completely
wrong.

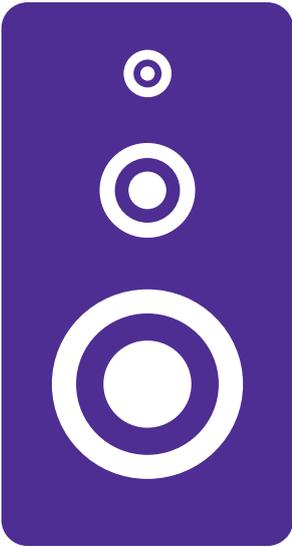


The World's Finest Music Service
Hi-Fi Music Streaming
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With much more to read and admire



MUSIC IS BACK

Contact us! Sebastien Alexandre, Director, Legal and Business Affairs: sebastien.alexandre@qobuz.com



TELIASONERA & SPOTIFY PROVE THE PARTNERSHIP MODEL IN SWEDEN

TeliaSonera has operated a partnership with Spotify since 2009. It is one of the most successful and enduring music service telco 'bundles' on the market. Telia invests heavily in marketing, placing the Spotify brand at the heart of its mobile content offer to both new and existing customers. As a result, the network has seen improved brand recognition and customer acquisition, as well as reduced churn. The partnership also attracts younger customers to the Telia network, while Spotify has seen penetration in Sweden increase massively as a result of the deal. As a mark of its success, the partnership has been rolled out to other markets that Telia operates in.

Similar successful partnerships exist in other markets. Spotify has signed an agreement with KPN in the Netherlands whose success helped the country's digital market increase by 56.1 per cent in 2013. In Thailand, the partnership between Deezer and DTAC made the territory one of the early leading markets in Asia for the digital streaming service.

4. MUSIC GOING FURTHER – THE EXPANSION OF DIGITAL MUSIC INTO THE HOME AND THE CAR

One of the key benefits of digital music stored on portable and personalised devices is the ability to connect them easily to in-home music systems. The real driver in this market has been wireless speakers which play music streamed from mobile devices or computers using Apple Airplay, Bluetooth or Wi-Fi.

The growth of wireless speakers has been rapid, with a wide range of speakers available at all price ranges. Wireless speakers have begun to replace their predecessors, 'docking stations', with entertainment analysis company Futuresource Consulting predicting wireless to outsell docking stations from 2014.

Futuresource estimates that almost 60 million units of home audio speaker products (wireless speakers, docking stations, soundbars and 'integrated home audio systems') shipped worldwide in 2013, with wireless speakers the fastest growing category, making up around one-fifth of all audio speaker products sold.

One of the best known home audio brands for digital music is the Sonos multi-room wireless audio streaming system. Since its launch in 2004, Sonos has vastly expanded its speaker range and now integrates with most major digital music services including including Napster, Pandora, Rdio, Rhapsody and Spotify.

Digital music is starting to integrate to a much greater degree with home audio systems. In 2013 Spotify launched a 'Connect' feature that lets users shift playback between their handsets and different Wi-Fi-connected devices in the home. Playing music through wireless speakers using Spotify Connect streams music directly from the Spotify's cloud servers, not from the device, so users can continue to use either of those devices without having to worry about interrupting playback or draining phone battery.

It is expected that manufacturers will now move to further integrate digital music into the device speaker. Already many wireless speakers provide access to internet radio streaming and many new models are expected to feature 'offline music' – enabling users to transfer music from their streaming accounts to the speaker, allowing greater portability and playback without an internet connection.

HIGHER QUALITY AUDIO FORMATS GROWING INTO A HIGH VALUE NICHE FOR DIGITAL MUSIC

While consumers have been demanding high-definition (HD) quality films and television programmes to match the improvements in screen quality for years, HD has not yet become mainstream in digital music. The growth in digital music has been so rapid that most consumers are used to listening to 'compressed' audio formats across downloads and streams.

While manufacturers such as B&W, Naim, and Linn introduced niche high definition audio stores or subscriptions a few years ago, other services are developing services that offer increased audio quality.

Spotify and Pandora now offer streams at higher 'bitrates' and some services have chosen to make sound quality a differentiator. The market for hi-definition streaming is unproven as yet, but there have been some notable entrants into this market in 2013.

WIMP launched its 'Hi-Fi' streaming service in 2013 having encoded its entire music library in 'lossless' format, using FLAC and Apple Lossless.

Qobuz, another high quality streaming service aimed at audiophiles, rolled out in several new markets in early 2014 and also announced a partnership with Sonos, which saw CD quality streaming brought to its wireless speakers for the first time. The partnership covers nine countries in Europe with users getting unlimited access to CD-quality FLAC files at 16-bit/44.1kHz for a monthly fee of €19.99.

Another interesting development has been WIMP's move to bring video streaming into its service. This is something that has been explored before by streaming services, but WIMP is the first to launch an integrated video and audio service.

This innovation fits well with the addition of music apps into smart TVs and may also be attractive to tablet users. A 'multi-media' music service has yet to arrive but this is an interesting first step and the music industry expects to see more innovation bringing together audio, video, live performance streams and the wide variety of 'label copy' data available such as images, lyrics and sleeve notes.



RARA BUILDING ITS STRATEGY ON INTEGRATION

rara was launched by music technology company Omnifone in 2012. The service is now live in 32 territories around the world, offering a licensed catalogue of more than 24 million tracks. Users can pay either €4.99 or €9.99 per month for rara, with the premium service enabling users to create offline copies of the music they listen to.

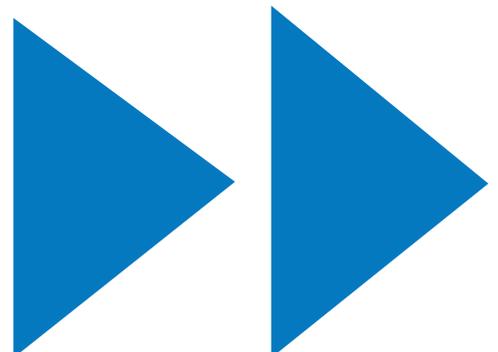
rara is seeking to expand its reach beyond the PCs and mobile handsets that most music subscription services use to reach their customers. The service launched a partnership with Sonos in early 2014 to help take the service into the living room, following the rollout of high quality audio in late 2013.

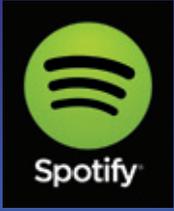
rara has also signed a deal with BMW that has seen it launch Europe's first in-car on-demand music streaming service. In July 2013, the service was launched in the BMW 5 Series across France, Germany, Italy, the Netherlands, Spain and the UK. It subsequently rolled out to other models and is now installed in the majority of new BMW cars.

This will enable more flexible outdoor listening for example – something many music fans will see as a valuable feature.

Meanwhile, the car is an increasing focus for integration with music streaming services. Research company ABI has predicted that by 2017 more than 50 million cars with in-car streaming services will be sold worldwide. In the US, Pandora has been pursuing deals with car manufacturers.

As with home audio, the real breakthrough for in-car playback is likely to be the ability for car music systems to have hard drive capability to store music and playlists offline, so that users can stream music without relying on connectivity – an obvious problem when travelling. Once car manufacturers partner with streaming services to integrate offline playback, music service providers are expected to receive another major boost in demand.





STREAMING INTO THE FUTURE

In analysis for IFPI in 2012, Spotify compared total track streams with median rank and found that while Gotye's album *Making Mirrors* had the highest total streams of 2012, it was placed at number 26 when measured by median track ranking, with Lana Del Rey's *Born To Die* topping the chart for most democratically 'streamed in full' album of the year.

In 2013, Macklemore & Ryan Lewis topped the chart for total streams, but the median rank top spot was claimed by Daft Punk. Imagine Dragons' single, *Radioactive*, has been streamed over 200 million times and their album *Night Visions* came third in total streams, but fell out of the top 10 for median rank. P!nk and Passenger saw single-driven albums (ranking 6 and 8 respectively in total streams; falling to 63 and 36 on median rank). The chart gives an interesting insight into how people consume albums on streaming services; revealing consumption patterns rather than transactions, so interaction with every track on an album can be analysed.

Album	Total Streams rank	Median rank
Macklemore & Ryan Lewis - The Heist	1	2
Calvin Harris - 18 Months	2	4
Imagine Dragons - Night Visions	3	15
Lana Del Rey - Born To Die - The Paradise Edition	4	6
Bruno Mars - Unorthodox Jukebox	5	3
P!nk - The Truth About Love	6	63
The Lumineers - The Lumineers	7	5
Daft Punk - Random Access Memories	8	1
Passenger - All The Little Lights	9	36
One Direction - Take Me Home: Yearbook Edition	10	13

One notable omission from this chart is Avicii whose record breaking single *Wake Me Up* was not classified as an album track on the service. Median rank: album popularity as measured by balanced consumption across all tracks. Streams rank: album popularity as ranked by total stream count of tracks from album.

STREAMING BY AGE GROUP: ELVIS HAS NOT LEFT THE BUILDING

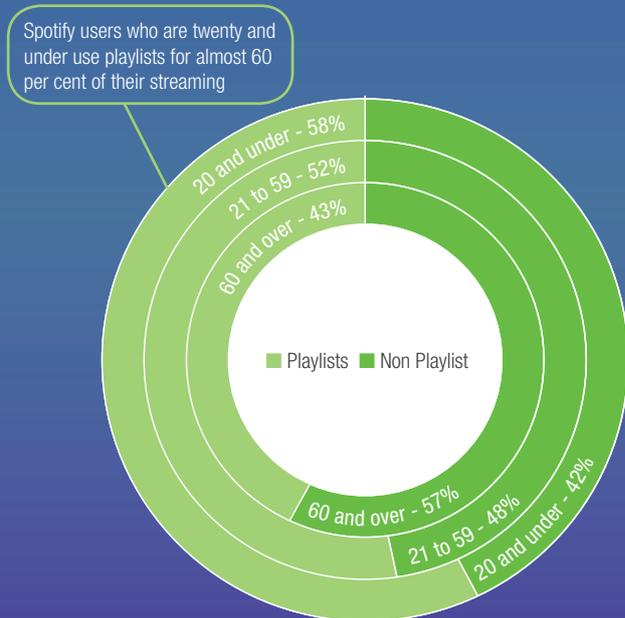
Spotify's data also allows comparison of consumption by age group. Comparing a sample of streams across 2013 by users who are 15 and under, with those aged 60 and over the results for the younger group are not surprising, with One Direction and Justin Bieber topping their chart. Amongst older Spotify users, the Rolling Stones and Michael Bubl  find themselves in the company of none other than the king of rock and roll. We note that while Elvis may have 'left the building', he hasn't left the hearts and minds of Spotify's older user base!

Top Artists by Age Group	15 years and under	60 years and over
No. 1	One Direction	Elvis Presley
No. 2	Justin Bieber	Michael Bubl�
No. 3	Eminem	Rolling Stones

PLAYLISTS AS A POINT OF ENGAGEMENT

Playlists have exploded within streaming services, complementing the album's more traditional form of music consumption. The ease of creating and sharing playlists, and their viral traction, means playlists are rapidly gaining popularity. In the five years since Spotify's launch, over 1.5 billion playlists have been created on the service.

The chart below shows streaming behaviour by 'source', whether from a playlist (self-created or compiled by others) or from other music a user has chosen to play. It demonstrates that playlists dominate streaming behaviour for the under 20s, and perhaps more interestingly among 21 -59 year olds as well.



PLAYLIST CULTURE: TURNING CONSUMERS INTO BROADCASTERS

Playlists' remarkable popularity has been driven both by demand (users creating their own lists) and supply (editors and third party curators using the service). This area of the digital music space is driven by the ability to turn consumers into broadcasters. The chart below captures some well-known playlists, such as the Billboard Hot 100, as well as some interesting ones such as Sean Parker's Hipster International and Film Soundtracks.

Playlist Type	Playlist Title	Followers
Chart	Billboard Hot 100	1,682,158
Curator	Hipster International	849,516
Spotify curated	Your Favorite Coffeehouse	259,315
Label	Digster Hits	225,716
Radio	The Triple J Hitlist	143,812
Artist	One Direction	137,742
Film soundtrack	Frozen Soundtrack	51,045

EMERGING MARKETS

RAPID GROWTH IN EMERGING MARKETS DRIVEN BY DIGITAL

Before the development of digital platforms and services many countries across Africa, Asia and Latin America were marginal markets for record labels, held back by sparse retail infrastructure and high music piracy levels. The situation is changing however. While physical formats are declining sharply in most developing markets, digital revenues are seeing strong growth, particularly on mobile where music services can 'leapfrog' the fixed-line internet and reach consumers directly via smartphones and feature phones. Record companies and services face particular challenges in developing markets. They include low broadband connectivity, lower credit card penetration levels and often rampant levels of piracy.

In the mobile sector, pre-paid contracts are one way of addressing low credit card penetration. In emerging markets, the mobile sector is dominated by the pre-pay model, with 80 per cent of mobile users in Latin America and 96 per cent of those in Africa on such deals. However, with handset prices falling and disposable incomes increasing, mobile operators are expected to develop the trend toward post-pay and contracts, which will drive opportunities for music services.

"EVERY MARKET IS DIFFERENT, WITH VARYING SOCIO-ECONOMIC FACTORS, TECHNOLOGY INFRASTRUCTURE, CREDIT CARD PENETRATION RATES, MOBILE OPERATOR BILLING SYSTEMS AND ANTI-PIRACY LEGISLATION. ALL THESE DIFFERENCES IMPACT ON HOW FAST THE RECORDED MUSIC MARKET CAN GROW."

**ROB WELLS, PRESIDENT,
GLOBAL DIGITAL BUSINESS,
UNIVERSAL MUSIC GROUP**

BRAZIL AND MEXICO BECOME HOTBEDS FOR DIGITAL IN LATIN AMERICA

In Latin America, digital is rapidly becoming the majority distribution channel for music, accounting for 35 per cent of overall revenues across the region. The arrival of music streaming services and their partnerships with telcos are helping to drive growth as are the growing number of licensing agreements that have monetised YouTube and Vevo across the region. Sustained year-on-year growth in performance rights, alongside digital helped the region grow revenues by 1.4 per cent in 2013.

Demand for local repertoire remains high in markets such as Brazil and Mexico and local repertoire is popular in Argentina and Colombia. As an example, nine in 10 of the top selling albums in Brazil in 2013 were by locally signed artists.

The dominant markets of Latin America are Brazil and Mexico, accounting jointly for 70 per cent of revenues in the region. Brazil saw continued strong digital growth in 2013 (up 22.3%), helped by the arrival iTunes in 2012 and strong demand for feature-phone driven mobile products.

The staging of the World Cup in 2014 has animated the music market in Brazil, a country driven by a rich national music culture. Som Livre, the largest Brazilian record label, focuses on local music while seeking partnerships with other independent labels around the world.

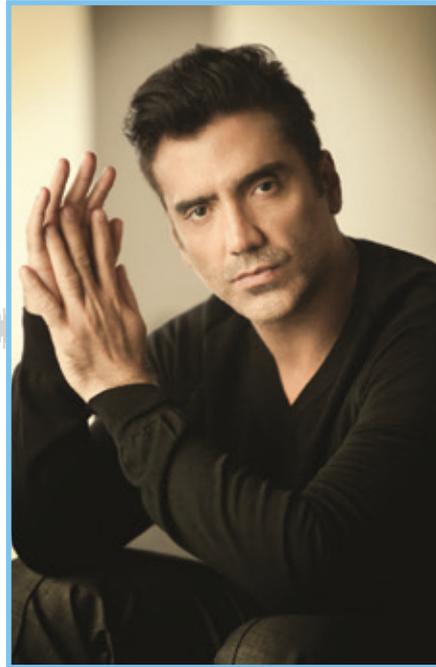
Mexico was the launchpad in the region for Spotify in 2013, closely followed by Argentina. With subscription services yet to take off in Latin America, the arrival of the service, along with Deezer and Google Play Music All Access, is seen as a key development. Having launched initially as a standalone service, Spotify's recent deal with Telefonica is expected to help the service achieve far greater reach in Mexico.

Spotify has also priced the service in line with the regional economies. Charging in local currency, Spotify Premium costs the equivalent of US\$7.55 in Mexico and US\$4.50 in Argentina.

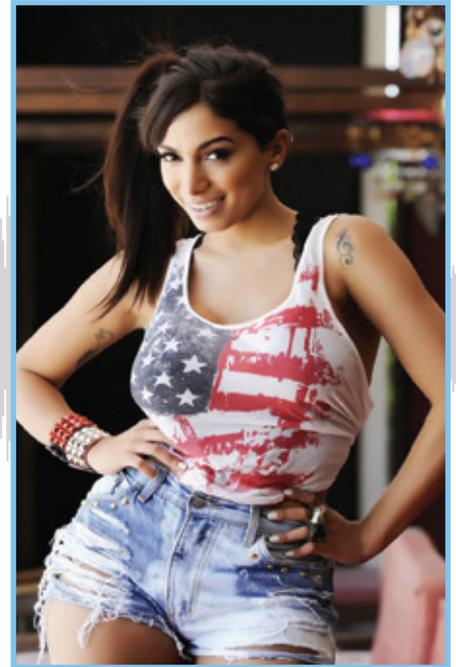
The availability of the service's free tier has potential to help reduce file-sharing in a region where music piracy has hampered the success of licensed music services.

Downloads are also growing in Mexico, with iTunes available in local currency and with pre-pay cards – important elements of its success in that market together with a focus on regional Mexican music. In 2013 download sales increased by 13 per cent. Other download stores available in Mexico are ITODO, MIXUP Digital, Nokia Mix Radio and Xbox Music.





Alejandro Fernandez. Photo courtesy of UMG



Anitta. Photo by Washington Possato

TELCO BUNDLES – A KEY STRATEGY IN LATIN AMERICA

A number of major telco networks in the Latin American region have signed up with music services to bundle with their mobile subscriptions. With low credit card penetration in Brazil and across the region, partnerships with carriers are seen as the key to success for streaming services.

Telefónica signed a deal with Rhapsody in late 2013, to bring Napster to its local Terra mobile network customers (previously Terra had offered its own music service, Sonora). In addition to Brazil, the new Napster service is expected to roll out in Argentina, Colombia, Chile, Peru and Mexico during 2014.

Other mobile networks in Brazil are also actively involved in music. Building on its success in the US, Muve Music partnered with TIM - a subsidiary of Telecom Italia and Brazil's second-largest mobile carrier. The service launched in 2013 offering unlimited music streaming for 50 cents a day. Meanwhile, Telefónica's major competitor América Móvil, made a US\$40m investment in music discovery service Shazam.

As part of its rapid global rollout, Deezer has a bundled deal with ISP Tigo in Central America and the Andean region.

“THE BIGGEST CHALLENGE IN DEVELOPING MARKETS IS FIGURING OUT HOW TO GET PAYMENTS PROCESSED FOR DIGITAL MUSIC SERVICES. THE MOBILE PHONE AND THE MOBILE CARRIER RELATIONSHIP IS KEY TO MAKING THAT WORK. IF YOU CAN BUNDLE MUSIC SERVICES IN WITH A MONTHLY BILL THEN THAT IS A GREAT WAY TO GET A BILLING RELATIONSHIP ESTABLISHED.”

**OLE OBERMANN,
EXECUTIVE VICE PRESIDENT,
DIGITAL PARTNER DEVELOPMENT,
SONY MUSIC ENTERTAINMENT**

“INSTEAD OF SIX COUNTRIES GENERATING MOST OF THE INTERNATIONAL REPERTOIRE, THERE WILL BE DOZENS, SO IT IS IMPORTANT TO OPERATE IN ALL OF THOSE MARKETS. EVERY MARKET IS A POTENTIAL SOURCE OF GREAT MUSIC.”

**AXEL DAUCHEZ,
CEO, DEEZER**

AFRICA - A CONTINENT OF OPPORTUNITIES

Africa offers huge opportunities for the recording industry over the next few years. The region has always had a thriving and diverse local music scene, and advances in mobile technology mean that record companies can now effectively reach a huge swathe of consumers across the region. Africa also has the youngest demographic in the world, with 50 per cent of the population under the age of 20, making it an attractive market for music companies.

Mobile phone penetration in Africa is growing dramatically. There were 742 million mobile connections in Africa in 2012 and this figure is expected to soar to 1.2 billion by the end of 2018 (Informa Telecoms & Media). The predominant form of handset is the feature phone, which enables consumers to use personalised mobile products, such as ringtones, and access interactive voice response (IVR) music services.

Smartphone penetration is also growing rapidly, with low cost handsets manufactured by Chinese firms such as Huawei, Tecno and ZTE, enabling consumers to access more sophisticated digital services.

The spread of mobile connectivity is vital to record companies in a market where fewer than 5 per cent of households have a fixed line broadband connection.

Mobile broadband is also rolling out across Africa, with 4G LTE networks launching recently and commercial services available in Angola, Mauritius, Namibia, Nigeria, South Africa, Tanzania and Uganda.

In addition to music services, mobile messaging and gaming apps are growing in Africa and, as in Asia, represent strong marketing and licensing opportunities for music artists.

International record companies and digital music services are expanding their activities in Africa, setting up local offices and partnerships, complementing domestic independent labels. Africa is a region of diverse national markets, requiring local partnering strategies and a strong understanding and focus on what is a thriving and diverse music scene.

Deezer is the most widespread service in Africa, operating in 38 markets across the region, while iTunes is present in 16 countries.



THE KLEEK, a new streaming service developed by Universal Music and

Samsung, launched in Angola, Ghana, Kenya, Nigeria and South Africa in early 2013. At the same time, ad-supported streaming service Yala Music launched in North Africa.

South Africa, the continent's leading music market, recorded a sharp increase in digital revenues of 106.8 per cent in 2013, despite a continuing slide in CD sales. This surge followed the arrival of iTunes in the market in 2012 which had the effect of rapidly growing digital music's share of services, albeit to a relatively modest 14 per cent.



Xtatic. Photo by Erik Foster

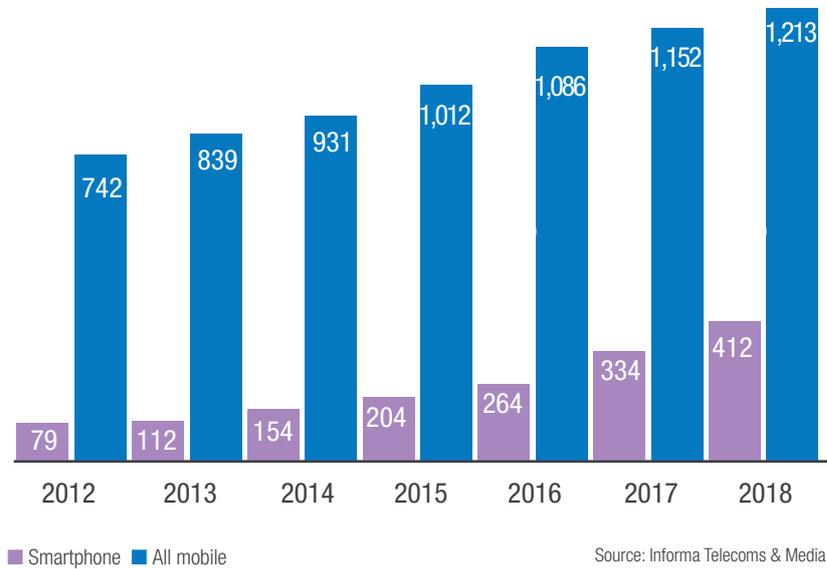


Keko. Photo by Biceps Photography

"YOU CAN REALLY FEEL THAT SOMETHING IMPRESSIVE IS HAPPENING WITH DIGITAL MUSIC IN AFRICA RIGHT NOW. TWO YEARS AGO, THE DIGITAL BUSINESS WAS ALMOST ALL RINGTONES. TODAY PRODUCTS AND SERVICES ARE TAKING OFF AND INTEREST FROM OUR GLOBAL PARTNERS IN THE CONTINENT IS GREATER THAN IT HAS EVER BEEN."

ULRIK CAHN, VP DIGITAL BUSINESS,
EMERGING MARKETS,
UNIVERSAL MUSIC GROUP

AFRICA: MOBILE AND SMARTPHONE CONNECTION FORECASTS 2012-2018 (MILLION CONNECTIONS)



Rose Muhando. Photo by George Mahashe





CHINA : NEW HOPES FOR A LICENSED MUSIC MARKET

China is a music market of enormous potential, long stifled in its development by rampant levels of piracy. Despite having the largest number of internet users in the world, China's music market is ranked 21st globally, with revenues in 2013 at US\$82.6 million.

Yet the landscape for the music industry in China is changing. Record companies are actively licensing music to the country's largest online services and encouraging the rollout of new consumer offerings. Combined with the industry's continued pressure for copyright enforcement, the strategy aims to create the first sustainable paid-for music services in China in the next few years. Digital music already makes up more than 79 per cent of total music industry revenues accounting for US\$65.4 million.

As in other Asian music markets, increased internet use and rapid migration to mobile is driving change. China's digital revolution has created a huge consumer population of more than 618 million internet users in 2013, 81 per cent of whom are connected to mobile. Access to this expansive consumer base is concentrated among a relatively small

number of Chinese mobile operators and internet companies. It is estimated these major platforms account for around 80 per cent of all internet traffic. In the last two years, major record companies and some independents have licensed eight of China's major online music services, most of which were previously unlicensed. These services – including Xiami, Tencent, Kuwo and Kugou - offer consumers free-to-user streaming of tracks supported by advertising, in addition to paid-for streaming and downloads.

The recent wave of licensing deals in China traces back to the landmark agreement struck in June 2011 between One-Stop-China (OSC), a joint entity founded by Universal, Sony and Warner, and the top Chinese internet company, Baidu. The agreement also involved the settlement of anti-piracy litigation and an agreement by Baidu to stop its infringing "deep links" service. The Baidu deal was a watershed in the Chinese music market. Sunny Chang, President of Greater China for Universal Music Group International, says: "The Baidu deal was a trigger that led to other internet companies changing their approach and becoming licensed. It will take time but it is real progress. We believe that in three to five years the market will be open and China could be one of the top markets in the world."

Alongside this closer cooperation between music and technology companies has come more vocal support from the government. In comments widely reported in the Chinese media, Vice Minister Yan Xiaohong of the National Copyright Administration of China (NCAC), said in April 2013 that he believed paid-for music downloads in China are "inevitable". He was similarly upbeat in an interview for this report: "The time for paying for music in China has already come - this is not just a principle but also a necessary practice. But what is also important is that, whichever way we choose, whether it be the paid or advertisement-supported model, we must make sure that right holders are rewarded. I think this will become prevalent in future. The music industry should embrace this new opportunity in the digital environment, especially along with the rapid development of the mobile internet – we can achieve a "win-win" situation between the mobile operators, the internet providers and the music companies."

Independent record companies, many Taiwan-based and accounting for more than 50 per cent of the market in China, are campaigning for the paid model along with the majors.



Helping drive momentum, according to CMIC, the organisation representing local Chinese labels, is intensified competition among distributors. China's largest music service by far is China Mobile, offering ringtones and ringback tones and, more recently, full-track bundled streaming and download subscriptions. The network has a customer base of 772 million customers, with just over 200 million on 3G services. Now it faces increased competition from other services. Mike Songke, Vice President of CMIC, says: "Because of smartphones and different services that are now available, people can use different applications so there are positive competitive factors bringing more distributors into the industry."

CMIC states that a paid model will encourage investment in local artists and help develop a thriving Chinese music business. Songke says: "We have to agree a new model with the internet companies and operators because within five years I believe the advertising-funded model alone will have no prospects. We may not have 100 per cent paid-for services but we need a new model. Our market can be 10 times bigger and we would start generating real value from our copyrights. We would be able to invest in artists and not rely on management and performance income."

There are challenges ahead, however. Piracy remains an enormous barrier to growth for the legitimate business, with unfair competition from hundreds of unlicensed services. In addition, CMIC sees the historically low returns to music rights holders in China as a key barrier to development of the sector. A study published by CMIC in 2012 estimated the total value of the digital music sector in China at RMB30 billion (US\$4.9 billion),

but the study estimated that a very small share of that revenue (less than 3 per cent) was being shared with copyright holders. Songke makes a comparison with China's booming film industry where box office returns are being ploughed back for re-investment into local film productions: "Nowadays it isn't just piracy that is our problem – we have to get a fairer distribution system that motivates our industry, just like in the film industry."

This message is understood by the government. Vice Minister Yan Xiaohong says there is great potential for market



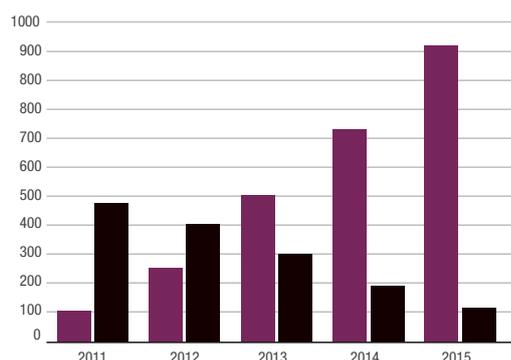
growth in China but agrees that the music industry is the weaker partner in its discussions with telecom companies. "In China right now, the situation is not balanced and the rights holders stand in a relatively weaker position. The job of the government is not to replace right holder organisations, but there needs to be equal cooperation on both sides and we support that aim."

"So the NCAC is making efforts to support right holders in their negotiations with operators and platform providers, in order to achieve a balance."

China's licensed digital music services are fast-evolving and highly competitive, with some expectations of rationalisation in the sector at the time of this report's publication. Most of China's newly-licensed digital platforms are pushing to develop the paid model. One of the leading ones is **QQ Music**, owned by the internet company Tencent, followed by **Kuguo**. Next in line is **Kuwo**, a service founded in 2005 which today has

a 300-strong workforce that has doubled in the last two years. Unlike competitors such as Baidu, Kuwo is a standalone music service rather than a search engine or telecom company. It says the vast majority of its users stream music for free. Kuwo's CEO Lei Ming - who prior to his present role was one of the founders of Baidu - says the critical hurdle now is to jump to the paid-for model.

He is optimistic this will happen. "We now have to think about making this a real business. In China the majority of people are now using legal music – that's a very good environment to be in, but the big question is how can we transfer consumers from free to paid, and how to do that without pushing our users to illegal sites?"



CHINESE MOBILE HANDSET MARKET (INSTALLED BASE IN MILLIONS)

■ Basic Handsets ■ Smartphones

Source: Futuresource Consulting

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Like other music services in China, Kuwo offers users a paid-for option as well as free streaming. Subscribers are offered downloads, premium videos and added customer services for an option of RMB5 (US\$0.80) or RMB10 (US\$1.60) per month. However, Lei Ming says the paid-for service has very low user numbers due to competition from free. "We believe in the future we can get five to ten per cent of users paying for our service. That would be a huge market. Some people have the buying power and want to enjoy the higher quality service." Lei Ming points to existing paid-for services by the other licensed online platforms. The most established is QQ Music, run by Tencent, which has offered paid-for streams and downloads since 2010.

Pursuing a different licensed model is **Baidu**, China's largest search engine and its first major licensed online music service. Like other internet companies in China, Baidu is adapting to the rapid growth of mobile and smartphones. Its music service is licensed by more than 800 independent labels plus the international companies. In September 2013 Baidu announced a new song-recognition app for music played over the air, allowing users to identify the song, artist and album artwork via an audio "fingerprint".

Baidu offers a free music streaming service and, in addition, a paid-for tier offering expanded cloud storage space and high quality larger files. As with Kuwo, the vast majority of Baidu's users choose the free-to-consumer option. However, unlike Kuwo and the other internet portals, Baidu sees the future of the digital music business as mainly free-to-user and advertising supported.

Kaiser Kuo, Director of International Communications, says: "Baidu has an ad-funded model and our core strategy is based on online advertising and dominating at consumers' main points of entry to the internet."



The largest player by far in China's digital music business remains **China Mobile**, the country's giant state-owned telecom operator. China Mobile first launched a ringback tones service, Migu Music, in 2006 and has since then moved into full-track subscriptions and downloads. China Mobile has an exceptionally strong market position, with 700 million users in total and 50 million active paying ringback tone customers. In addition there are 20 million paying subscribers to the operator's subscription and limited-download music service. Migu Music offers access to a library of 2.3 million licensed tracks, with rates of between RMB 1 and 5 (US\$0.80) per month. Despite the growing competition that China Mobile now faces from the other licensed digital platforms, the company believes its established

billing system and vast consumer base give it an advantage over rivals. Assistant of the General Manager of China Mobile Music Base, Liu Yu Xing says: "Until recently all the internet services were free, but this year there were some obvious changes and more and more services are trying to develop paid-for services. It is not just recording companies and musicians in China who want to get to this paid-for model – it is the objective of the operators too. But China Mobile has already had a paid service for a very long time, and we have also created a payment system that is convenient for customers."

As well as licensing services, record companies want to step up artist development in mainland China. In the short term this is a challenging task due to undeveloped production facilities. Furthermore, Chinese regulations on foreign participation in certain "cultural activities" limit non-Chinese investment both in production and in distribution of music, including online music services. In the absence of a developed market for sales of recordings, labels working in China rely heavily on management and live performance income. Most big-selling artists are developed in Taiwan, dubbed the "Hollywood" of the region with far higher quality production facilities than China. One of the leading indies operating in China is Taiwan-based **Linfair Records** which has an office in Beijing with ten staff handling marketing, new media and finance. Linfair Records is trying to develop more artists in mainland China and not just in Taiwan. The label's top artists include Fan Fan, a judge on China's growing and influential TV talent shows, and Yu Chen Ching (Harlem), a Taiwan singer who is the label's top male artist.

Kingson Jin. Photo by Zheming Zhang



Ruhan. Photo by Ziping Zheng

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Linfair Records sees positive progress to the paid model, but says the government's support through copyright enforcement action against illegal sites will be vital in making this work. Chairman Denver Chang says that CD sales and management income cannot be the long term future for record companies in China: "With a big hit we can get more substantial revenues in management fees, but very few artists can achieve that. So we have to pay attention to the paid-for services. The paid model is the only way to run a record company. The good news is that we know that the platforms want to have paid services, and the government recognises that too. The interests of the music industry and the internet companies are aligned."

The key question for the Chinese music business now, Chang says, is how to attract consumers to paid-for services while free music remains widely available. He believes a two-pronged strategy is needed: first services must restrict their free-to-consumer offerings, even if this risks driving some consumers back to piracy in the short term; and second, enforcement against remaining pirate sites must be stepped up, with help from the government. "Before the digital business developed, the only places that sold legal CDs were the major record shops.



Grady Anthan. Photo by Joao Ventura

"The vast majority of people got CDs from thousands of underground outlets. Now, thanks to the licensing deals, we have turned a lot of the piracy into a licensed market, which is good news. The next step is to move to a paid model. Even if 10 per cent of people pay that is still 10 times more than now. There may be some increase in piracy at the beginning – that is where we will need to step up action against illegal sites, with help from the government."

International music industry executives with long experience in the Asia region agree that the environment in China is changing, even though the rewards may be long term. Lachie Rutherford, President of Warner Music Asia Pacific, says: "China is a market which will always be a long road due to the complexity of the political and commercial environment, but there is a now a genuine shift to a realisation that a transactional paid model for digital music in this market is in the interests of all participants in the digital value chain."

Record companies and digital services agree on the critical continued role of enforcement in China. Following the licensing deals that some repertoire owners have struck with the major digital platforms, the government now has a vital part to play in tackling the thousands of remaining small and medium sized infringing sites.

NCAC Vice Minister Yan Xiaohong says the government has stepped up actions both in enforcement and promoting consumer awareness of intellectual property rights. "Nine years ago when I started in this role, we were talking about copyright theoretically but since then dramatic changes have happened. Criminal penalties for copyright infringement have been strengthened and enforcement against illegal sites intensified."

There are other important changes in prospect for the licensed music industry in China. Alongside the search for a paid-for digital model is a proposal, for the first time, that China should introduce public performance and broadcast rights for producers into its copyright law. An amendment to this effect was proposed by the NCAC in December 2012 and is currently under consideration by the Legislative Affairs Office of the State Council (LAOSC). If supported by the LAOSC, the proposals would go to the National Peoples' Congress for enactment. The amendment, if adopted, would see the first payments of public performance and broadcast royalties to producers in China. Chinese record companies view this as a big potential step forward for the music industry. Zang Yanbin, President of local labels association CMIC, says: "We have fought for a long time for performance rights in China, and now this landmark is in sight. It will mean that, for first time, record labels will make additional revenues they can invest back into new talent."

China is still a music market in its earliest stages of development, providing insufficient value for music creators but with enormous potential for the future. The industry made important first steps in developing a digital business in 2013: it capitalised on the opportunity presented by internet users' move to mobile, licensed digital music platforms and provided consumers with easily-accessible licensed alternatives to piracy. The challenge now is to transition to a sustainable paid model that rewards and creates value for rights holders, and which is accompanied by robust copyright enforcement against piracy.



DIGITAL PIRACY - AN EVOLVING PROBLEM

The music industry has built a US\$5.9 billion digital marketplace despite the continuing unfair competition offered by unlicensed services illegally providing access to copyright infringing music. For the recording industry to achieve sustainable growth in the years ahead, policymakers worldwide need to ensure that it can trade in a fair legal environment where copyright law is robustly and transparently enforced.

The scale of digital piracy globally remains vast. Based on comScore/Nielsen data, IFPI estimates that 26 per cent of fixed-line internet users worldwide regularly access unlicensed services. The recording industry believes all parties in the digital economy have a responsibility to support legitimate commerce online and help tackle the piracy problem. The recording industry is working to secure greater collaboration from a range of players in the digital economy, including advertisers, domain registrars, internet service providers, payment providers and search engines to achieve this goal. Despite making progress in many areas, digital piracy remains at an extraordinarily high level and offers continuing unfair competition to licensed services harming their ability to develop to their full potential.

WEBSITE BLOCKING

Actions by ISPs have become a widely-accepted and effective way of curbing piracy online. Increasingly common is the blocking of infringing websites. In recent years, courts in 17 countries have ordered ISPs to block users' access to specific services that structurally infringe copyright law and Italy has become the first European country where an administrative body is empowered to authorise blocking.

Website blocking measures implemented by ISPs have been effective. Between January 2012 and July 2013, European countries where blocking orders are in place saw BitTorrent use decline by 11 per cent, while European countries without such orders saw BitTorrent use increase by 15 per cent (comScore/Nielsen).

In March 2014, the Court of Justice of the European Union confirmed that the blocking of infringing websites by ISPs is an available remedy to rights holders under EU law. The court also confirmed that such website

blocking is compatible with the Charter of Fundamental Rights of the European Union as copyright is itself a fundamental right requiring protection.

The full potential of website blocking to tackle global digital piracy has not yet been realised because many jurisdictions still lack the necessary legislation to implement it and the process in some other countries is still too slow and burdensome for rights holders.

Rights holders also work with ISPs on notification programmes in some countries. Account holders are notified that their account is being used unlawfully, with the possibility of deterrent consequences if warnings are repeatedly ignored. These programmes have proven effective, with use of unlicensed P2P networks declining by 27 per cent since September 2010 in France (Nielsen) and by 19 per cent since August 2011 in New Zealand (comScore). This success could be built on if these countries adopted measures to tackle other forms of digital piracy so that the effect is to fully migrate consumers to licensed services rather than other infringing channels.

STOPPING PAYMENTS TO PIRATE SERVICES

The music industry's anti-piracy work with payment providers, leading to the withdrawal of payment services to infringing sites, has been a positive example of successful cooperation. Since 2011, leading international providers such as MasterCard, PayPal and Visa have acted to ensure their services are not abused by illegal businesses wherever they operate. Progress to date has primarily been against unlicensed download stores, the industry hopes it will achieve its full potential by being extended to other forms of pirate music service.

CUTTING OFF ADVERTISING REVENUE

Advertising is a major source of income for many online pirate services. The advertising industry is engaged with rights holders on this issue in a number of countries from Mexico to Australia. In the UK, rights holders and advertising bodies are working with the City of London Police (PIPCU) to reduce

the prevalence of advertising on pirate sites. While the progress achieved so far is welcome, there is still a long way to go before brands and advertisers worldwide take a truly proactive approach to this problem.

SEARCH ENGINES SHOULD DO MORE

Search engines have pledged to do more to tackle online piracy, but there is still a long way to go. A search for the name of many leading artists followed by the term "mp3" in the leading search engines still returns a vast proportion of illegal links on the first page of results. The lack of adequate action in this area is increasingly at odds with Google's growing role as a licensed music service depending on effective protection of copyrighted content.

In January 2014, the global recording industry noted it had sent more than 100 million copyright infringement notices to Google without any sign that the search engine was taking a more proactive stance to downgrade structurally infringing websites in its search results. IFPI issued a statement calling on Google to take a number of measures, including fulfilling the promise to demote sites receiving extensive numbers of piracy notices, and ensuring that the "take down" of a song is effective and does not mean temporary removal, to be replaced seconds later.

LEGAL ACTION

In some circumstances, the recording industry has taken legal actions against large scale online piracy services. The industry has been engaged in litigation against the operator of the BitTorrent service isoHunt, one of the largest unauthorised BitTorrent sites in the world. The industry will continue to pursue enforcement action against the operators of other similar services. Streaming service Grooveshark has been blocked by ISPs in Denmark and South Korea as a result of music industry action.

If the recording industry can secure improvements in the legal environment in which it operates – through legislation, internet intermediary cooperation and, if necessary, through legal action – this will help it move towards sustainable long-term growth.

REGIONAL OVERVIEW

EUROPE

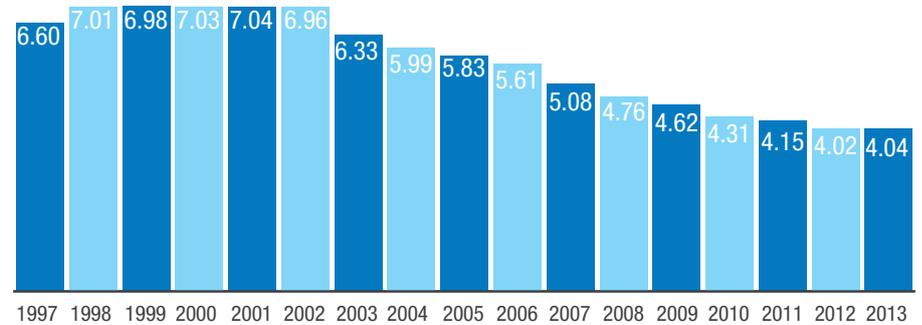
Recorded music revenues in Europe have returned to growth for the first time in 12 years, increasing by 0.6 per cent to US\$5.4 billion (€4.0 billion) in 2013. The region saw a reduction in the rate of decline of physical format sales combined with increasing digital revenue, the latter driven by growth across all digital formats. Digital revenues increased by 13.3 per cent - more than three times the global average - and accounted for almost a third of total European revenues. Performance rights income increased by 10.2 per cent, a resurgence driven by significant increases in France, Germany, Italy and the UK. Physical format sales continued to fall, but at a lower rate than the previous year, declining by 6.8 per cent, while still accounting for 56 per cent of revenues across the region.

The European recorded music market is becoming more diverse, with each country subject to unique characteristics and market dynamics. Overall, the region looks to be stabilising with the six major markets, France, Germany, Italy, the Netherlands, Sweden and the UK, all seeing a return to growth.

Germany is currently the biggest European market, closely followed by the UK. German trade value grew by 1.1 per cent to US\$1.4 billion (€1.0 billion) with digital sales up by 8.9 per cent and accounting for a just over a fifth of total revenues. Physical format sales in Germany which remain robust, with a drop of just 1.5 per cent, make up 73 per cent of all revenues.

Downloads increased in value by 0.8 per cent, and continue to dominate the German digital market, making up 82 per cent of its revenues. Revenues from subscription streaming grew by 105.8 per cent, more than doubling in size compared to the previous year, while accounting for 14 per cent of digital revenues. The further potential of this segment is underpinned by a survey published by WiMP in June 2013 which

EUROPEAN RECORDED MUSIC MARKET (€ BILLIONS)



Source: IFPI.

found that 60 per cent of Germans were listening to streaming music and that 28 per cent said they would be prepared to pay for it.

The **UK** market increased in value by 2.2 per cent in 2013 reaching US\$1.3 billion. Physical format sales decreased by 6.4 per cent, yet this was more than offset by digital revenue growth of 11.9 per cent. The key drivers of this increase were streaming (both subscription and ad-supported) and downloads which increased by 7.6 per cent. Ad-supported and subscription streaming accounted for 20 per cent of the total digital revenue across the whole year and grew by 35.6 per cent. Overall the UK has a strong digital sector, accounting for 44 per cent of revenues, the same size as its physical market.

Similar developments occurred in **France**, where revenues increased by 1.3 per cent and strong physical sales (+0.8%) combined with a digital increase (+0.5%) and a significant increase in performance rights (+14.1%) drove overall market growth. France's proportion of physical sales remains high (64%). Ad-supported services and subscription streaming accounted for 41 per cent of the digital market. Download sales were almost flat (-0.9%), holding a 54 per cent share of digital revenues. According to SNEP, France ended the year with 1.5 million streaming music subscribers, up from 500,000 a year ago.

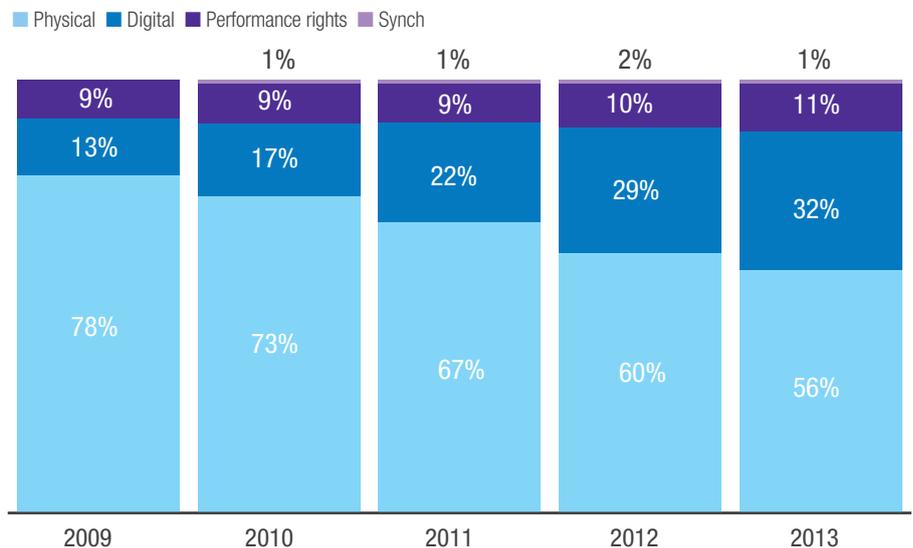
Performance rights income increased by 14.1 per cent, making up 12% of total industry revenues.

Italy reported an 8.3 per cent rise in recorded music revenues in 2013, driven by a jump in ad-supported and subscription revenues (+40.4%) and performance rights (+69.3%). Major levy back payments boosted performance rights which grew by 69.3 per cent in 2013, accounting for 15 per cent of total revenues. Download sales rose by 6.3 per cent and made up 60 per cent of digital revenues, while physical sales only declined by 4.8 per cent.

Swedish recorded music revenues grew by 5.7 per cent last year, with digital accounting for 70 per cent of the total market. Sweden is very much a market driven by subscription services - which account for 94 per cent of digital revenues and the vast majority of the entire market. Although a range of subscription services is available in Sweden, Spotify is the dominant player, where its partnership with TeliaSonera has helped it achieve a greater penetration than in any other territory. The overall growth in Sweden is all the more remarkable given the rapid decline of CD sales, which fell another 31.5 per cent in 2013 and accounted for just under one fifth of total music sales.



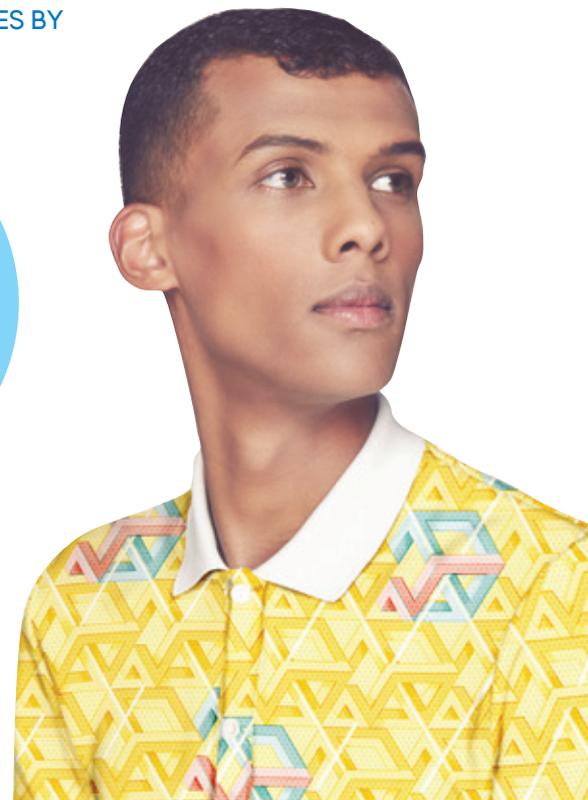
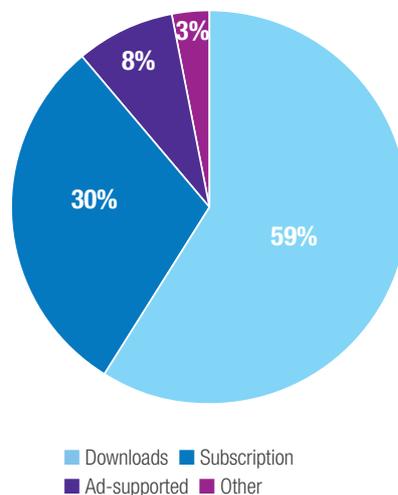
EUROPEAN RECORDED MUSIC SALES BY SECTOR (VALUE)



Norway (+2.4%) and **Denmark** (+4.7%) both reported overall market growth, Norway following a similar trajectory to Sweden with subscription services now making up 84 per cent of digital revenue.

In the **Netherlands**, music sales stayed close to flat with growth of 0.1 per cent with only a fall in physical sales dampening very strong digital growth. The two largest telcos (T-Mobile and KPN) continued to actively market music subscriptions through their partnerships with Deezer and Spotify. Consumer awareness and usage of subscription services is second only to Sweden in Europe. The report *Adventures in the Netherlands* by Spotify associates this with a reduction in the number of people using unlicensed sites in the Netherlands. Perhaps as a result, digital revenues in the Netherlands rose by 56.1 per cent in 2013, the highest growth rate in Western Europe for the second year in a row. Subscription services now make up the majority of digital revenues (54%), up from 30 per cent in 2012, making the Netherlands the market most comparable to the subscription dominated countries of Scandinavia. Physical sales fell by 19.2 per cent following a similar drop the year before, with physical now representing just under half of the total market.

EUROPEAN DIGITAL REVENUES BY SECTOR (2013, TRADE VALUE)



Stromae. Photo by Dati Bento.

NORTH AMERICA US: A MIXED ECONOMY OF MUSIC SALES

The **US** music market continued to stabilise in 2013, with trade revenues growing by 0.8 per cent. Overall, multiple digital revenue streams are growing at a rate that is offsetting an ongoing, but slowing, decline in CD sales.

Digital channels now account for over 60 per cent of US recorded music revenues. Digital is still dominated by downloads, which made up 76 per cent of total digital sales with a high proportion of digital album sales.

The subscription sector increased by 65.4 per cent in 2013 and now accounts for 13 per cent of digital revenues. Further growth is expected following the launch of new services such as Beats Music in early 2014, and the development of telecoms partnerships. Ad-supported streaming grew by 13.3 per cent, now accounting for 7 per cent of digital revenues.

Performance rights income, which includes revenues from internet radio services such as Pandora, grew by 65.3 per cent in 2013 and now account for 6 per cent of total revenues. The growth of access models - subscription services, ad-supported streaming services and internet radio - is driving diversification in the US, creating a mixed economy of music services.

NEW SERVICES AND TELECOMS PARTNERSHIPS EXPECTED TO SCALE THE SUBSCRIPTIONS MARKET

The on-demand music subscriptions model has been massively popular in Europe, but so far represents a growing early-adopter niche in a US digital market dominated by downloads.

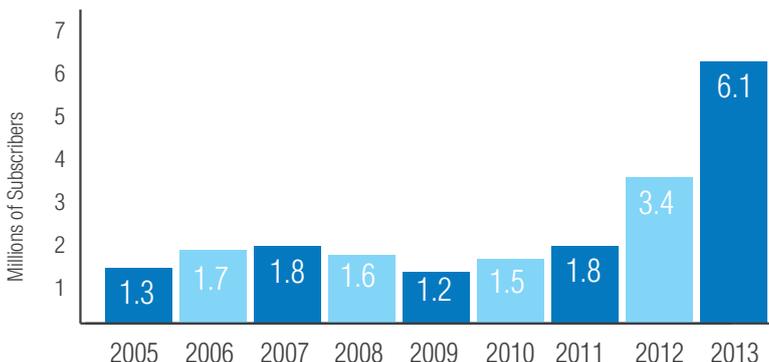
Early 2014 saw the market expand with the launch of Beats Music, alongside existing subscription services such as Muve Music, Rdio, Rhapsody, Google Play All Access and Spotify. While subscription services such as Rhapsody have been established in the US since 2005, music subscription is yet to hit the mainstream American market.

With US consumers familiar with subscription as a service model in cable TV and satellite radio – and growing interest from telecoms operators in bundling digital entertainment with subscription packages – there is potential to grow the music subscription market considerably in the coming years.

“INTERNET RADIO HAS THE POTENTIAL TO BE A GLOBAL MODEL. IT WILL HELP US SERVICE THE MORE CASUAL MUSIC FAN. OUR BUSINESS TRADITIONALLY HAD CUSTOMERS WHO DISCOVERED MUSIC VIA RADIO AND BOUGHT CDS, AND DOWNLOAD AND SUBSCRIPTION SERVICES HAVEN'T ALWAYS NECESSARILY BEEN GEARED TOWARDS THEIR LISTENING HABITS. INTERNET RADIO OFFERS US THE OPPORTUNITY TO REACH THESE FANS MORE EFFECTIVELY.”

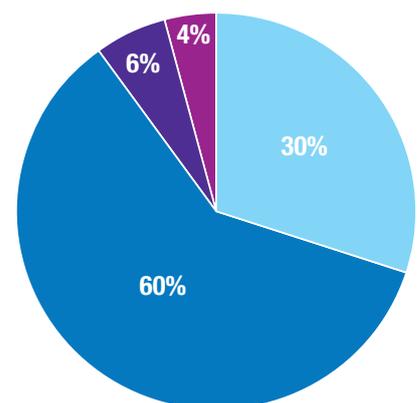
STEPHEN BRYAN, EXECUTIVE VICE PRESIDENT, DIGITAL STRATEGY AND BUSINESS DEVELOPMENT, WARNER MUSIC GROUP

NUMBER OF PAID SUBSCRIBERS IN THE US



Source: RIAA.

US TOTAL SALES BY SECTOR (TRADE VALUE) IN 2013



Physical Digital Performance Rights Synth



SMARTPHONES AND APPS DRIVE THE STREAMING HABIT IN THE US

The steep increase in smartphone usage has helped to rapidly drive music streaming in the US. US smartphone penetration was approaching 65 per cent by the end of 2013 with some 150 million people owning one (comScore).

Research into the music habits of US mobile users by AYTM Market in December 2013 found that 25 per cent 'listen often' to music on a mobile device (defined as a smartphone, MP3 player or tablet) while a further 27 per cent 'listen sometimes'. Of those who listened often, 60 per cent used a smartphone, 48 per cent used an iPod or MP3 player and 24 per cent used a tablet. The research also found that nearly six in 10 respondents had at least one mobile app that streamed music.

Along with internet radio streaming on mobiles, other services promoted by mobile operators are also helping drive the market. Muve Music, an unlimited mobile music download service developed by US regional mobile carrier Cricket Wireless, comes bundled with Cricket's US\$50, US\$60 and US\$70 monthly tariffs. Muve Music has reportedly reached two million customers (September 2013), about one-fifth of Cricket's mobile subscriber base.

This demonstrates not only the potential for music services to scale when marketed as an integral part of a bundle, but the growing importance of digital entertainment services to telecoms companies in offering customers greater value and reducing churn.

The launch of Apple's iTunes Radio in September 2013 was regarded as a significant development, claiming 11 million registered users in the first few days after launch. iTunes Radio and Pandora, together with services such as iHeartRadio and Slacker, make up an increasingly vibrant US internet radio sector with many services also available as apps on platforms including iOS, Android and Xbox.

According to research firm NPD Group, by April 2013, internet radio streaming accounted for nearly one quarter (23 per cent) of the average weekly music listening time among consumers between the ages of 13 and 35, an increase from a share of 17 per cent the previous year. However, in the 36-and-older age groups, internet radio accounted for just 13 per cent of music listening, with AM/FM radio still dominant with a 41 per cent share.

Another key platform for growth in the US is the car. Nearly half of all radio listening takes place in the car whether through satellite stations such as Sirius XM Radio or via internet radio. Pandora has been expanding its partnerships with auto manufacturers, and more than four million unique users have activated Pandora in-car, according to the company's announcements. Apple is also investing in this area. In March 2014 the company first introduced CarPlay which makes it easier for drivers to engage with their iPhones and therefore iTunes, without having to take their eyes off the road.

INTERNET RADIO GAINS POPULARITY AMONGST YOUNG CONSUMERS

Internet radio service Pandora has over 200m registered users and 73 million active users (as at January 2014, according to its own reports). The service also had 3.2m paying subscribers on its Pandora One service, which charges US\$3.99 per month for an advertising-free service (Q3 2013). This subscriber base contributed to one-fifth of Pandora's revenues, the rest being generated from advertising. A share of Pandora's revenues is passed on to the recording industry in the form of performance rights.

CANADA

Canada's music market saw growth of 10.4 per cent in digital revenues and 3.5 per cent in performance rights, but a 15.1 per cent decline in physical sales meant the market fell by 2.5 per cent overall.

Digital revenues account for nearly half of all music revenues in Canada, a market driven very much by download sales which account for 86 per cent of digital revenues. Both single track downloads (+6.8%) and albums (+6.9%) grew in 2013. Streaming penetration is still low with services such as Spotify yet to arrive. Ad-supported revenue grew by 49.8 per cent and now makes up 8 per cent of digital revenues.



ASIA

Overall recorded music revenues in Asia fell by 14.6 per cent, with physical sales down 15.8 per cent and digital revenues dropping by 13.5 per cent.

The performance of Asia was heavily impacted by Japan, which had a difficult year in 2013 and accounts for 82 per cent of market value of the region.

Outside of Japan, Asian digital revenues grew in the region from US\$327.5 million to US\$343.9 million. South Korea (+32.0%) and many smaller markets saw growth, including Hong Kong (+12.0%), Malaysia (+13.2%), Taiwan (+33.2%) and Thailand (+1.0%), while India and China experienced a decline in digital revenues.

Performance rights increased throughout the whole region, including Japan, by 4.6 per cent.

The value of the world's second largest music market, **Japan**, fell by 16.7 per cent in 2013. Physical sales grew in 2012, but dropped in 2013 by 16.0 per cent with fewer major releases by leading established artists and a slowdown of K-Pop CD sales. Japan is by far the biggest CD market in the world and physical sales account for 80 per cent of its overall industry revenue.

Digital sales make up 16 per cent of the overall Japanese market and also experienced a decline, impacted by a contracting feature phone-based download market as consumers shifted to smartphones.

Change is already underway in Japan's digital sector, however, with a small, nascent market for streaming and music subscriptions. Revenues from subscription services increased by 203.9 per cent but overall only accounted for 7 per cent of the total digital market. A small number of services including D-Hits, Sony Music Unlimited, KKBOX and internet radio service RecoChoku Best, have a presence in Japan, but are yet to drive widespread adoption of access services.

There are hopes that this will change in 2014 with Spotify expected to launch during the year. The download market is growing from a modest base, driven by the dominance of the iPhone in Japan which is now being sold by each of the three largest mobile carriers.

A new trend in Japan that will impact on music and may spread more globally is messaging apps. The messaging app LINE has attracted the involvement of high profile artists including Katy Perry. Artists create virtual stickers for the app, which users attach to messages. LINE has gathered 47 million users in Japan alone (300m users worldwide) and the company is focused on music content. The trend is also present in South Korea, where local superstar PSY has created stickers for KakaoTalk, South Korea's dominant messaging app, with over 100 million users.

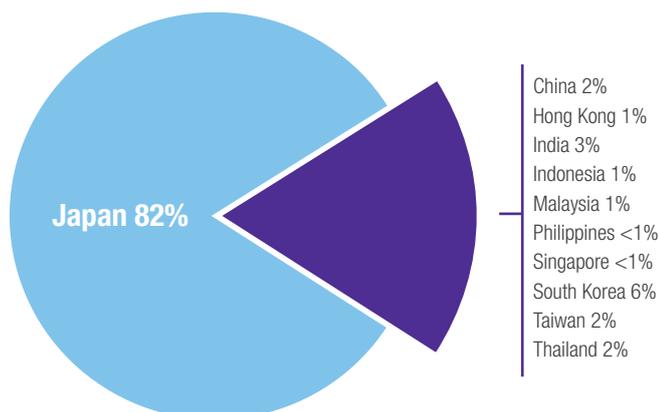
Asia's second largest market is **South Korea**, which grew by 9.7 per cent. The market recovered somewhat from the drop in 2012 following the collapse of social networking platform Cyworld.

South Korea is one of the world's largest subscription markets, with subscription services making up 85 per cent of the digital market and 43 per cent all music revenues. The continued growth of subscriptions drove the recovery in 2013 with growth of 50.6 per cent in revenue terms. Physical format sales fell by 7.2 per cent. As with Japan, the slowdown of K-Pop CD sales was the main reason for this drop.

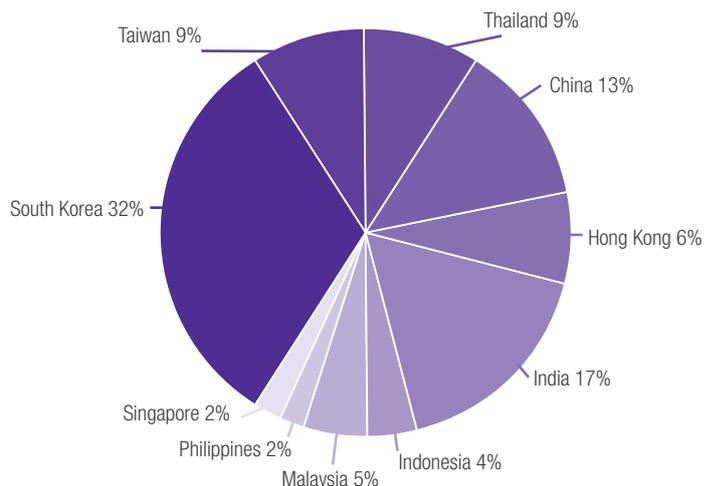
India and **China** are becoming more important music markets in the Asia region. Excluding Japan, the two markets make up almost a third of the region between them. Both saw market values drop in 2013; India by 15.9 per cent and China by 12.4 per cent. However, both markets are known more for their potential, driven by the growth and success of mobile networks, the arrival of new music services and an increasing number of licensing deals being done with record labels. Digital channels are already the dominant source of revenues, comprising 79 per cent of the market in China and 60 per cent of the recorded music market in India.

In **Taiwan**, continued growth of subscription service KKBOX helped drive digital revenues up by 33.2 per cent and the overall market by 2.0 per cent. This was helped by the increased use of the service on smartphones, which reached more than 50 per cent penetration in Taiwan during 2013. Another success in the region was the increase in digital revenues in **Indonesia** (up by 112.4 per cent) driven by strong growth in mobile products.

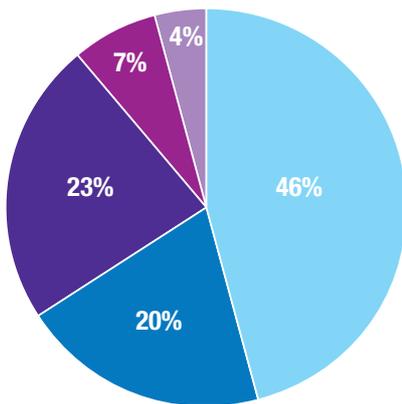
ASIA (INCLUDING JAPAN)
SALES BY COUNTRY (2013)



ASIA (EXCLUDING JAPAN)
SALES BY COUNTRY (2013)



ASIAN DIGITAL REVENUES BY SECTOR (2013)



■ Permanent Downloads
 ■ Ad-supported streaming
 ■ Other
■ Mobile Products
 ■ Subscription streaming



AUSTRALIA

The **Australian** market declined by 8.4 per cent, with physical format sales experiencing a sharp decline of 25.5 per cent. Digital revenue growth of 5.6 per cent was not enough to offset this but, as a result, digital revenue has overtaken physical sales for the first time in Australia. Digital revenues made up 54 per cent of the market. The download segment remained fairly flat with 0.2 per cent growth, though digital album sales rose by 6.4 per cent and downloads made up 87 per cent of digital revenues. Subscription streams and ad-supported income made up 11 per cent of digital revenues and almost doubled from US\$13.5 million in 2012 to US\$25.1 million.



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LATIN AMERICA

Following two years of steep growth, music sales in Latin America grew by 1.4 per cent, as heavy physical declines offset much of the continued strong digital growth in most territories.

The slowdown in growth was largely attributable to market declines in Brazil (-1.7%) and Mexico (-4.4%), the two biggest markets in Latin America, which combined make up 70 per cent of revenues. In both markets the dynamics were similar – digital continued to grow at double digit rates of more than 20 per cent but was offset by a steepening drop in physical format sales. Mexico is nearing a tipping point with physical (50% of the market) and digital revenues (47%) almost evenly split.

Argentina, the third biggest market in the region, recorded 13.9 per cent growth, with digital revenues increasing by 68.5 per cent and performance rights revenues also up by 27.3 per cent.

Other growing markets in the region included Central America (+2.2%), Chile (+2.6%), Colombia (+7.1%), Paraguay (+23.4%) and Peru (+61.0%).

Overall, digital music revenues in the region grew by 27.6 per cent - the highest digital growth among all regions, with some of the smaller markets seeing phenomenal digital growth: examples include Colombia (+84.6%), Peru (+148.5%) and Venezuela (+84.9%).

Digital growth was driven by the expansion of international services, the growth of mobile and pre-paid bundles, and the increased monetisation of YouTube across the region (please see 'Emerging Markets' section in this report for more detail).

Downloads – the biggest digital revenue stream by value in Latin America - continued to grow strongly, by 28.0 per cent, and comprised 44 per cent of digital revenues.

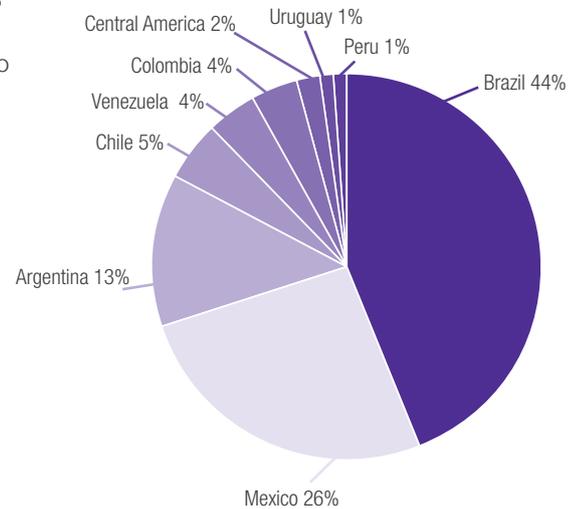
Ad-supported revenues also grew strongly - up 42.4 per cent to US\$44.9 million. According to YouTube statistics website ChannelMeter, Brazil and Mexico ranked ninth and tenth in terms of views

by countries, excluding the US. Both clocked up more than 10 billion views each over 12 months, an increase of over 40 per cent in both markets compared to the previous year.

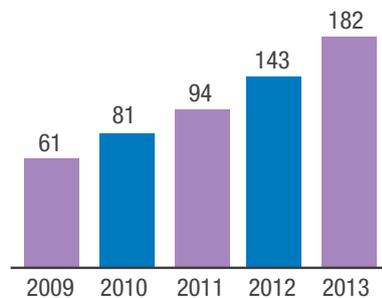
In Brazil the download segment continued to grow strongly increasing by 71.3 per cent and now accounting for 33 per cent of digital revenue. Feature-phone driven mobile services are still contributing 22 per cent of digital revenue and grew by 16.9 per cent in 2013.

In Mexico, downloads grew by 11.3 per cent and now constitute 65 per cent of digital sales, the highest ratio in Latin America. Ad-supported income now accounts for 22 per cent, driven by monetisation of YouTube, while subscriptions revenue income increased by 112.5 per cent, now making up 8 per cent of digital revenues. Ad-supported income made up an even greater proportion of digital revenue in Argentina (33%), Colombia (37%) and Peru (36%).

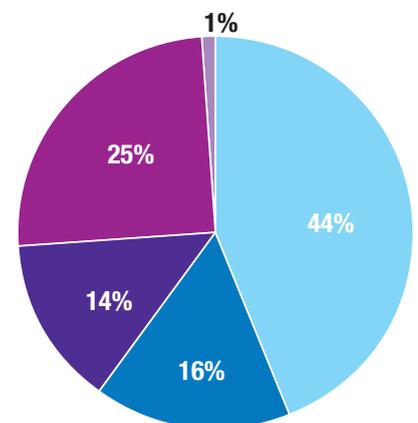
LATIN REGION REVENUES BY COUNTRY (2013)



LATIN REGION TOTAL DIGITAL REVENUES (US\$ MILLIONS) 2009-2013



LATIN REGION DIGITAL REVENUES BY SECTOR (2013)



■ Downloads ■ Mobile ■ Subscription ■ Ad-supported ■ Other



YEARS HAVE PASSED,
AND NOTHING'S THE SAME
BUT YOU'RE THE ONE THING
THAT ALWAYS REMAINS

WWW.MUSICREMAINS.ORG



MUSIC REMAINS — A 90-second race through time filmed at London's world-famous Abbey Road studios, Music Remains is a celebration of recorded music at the centre of people's lives.

COUNTRY INDEX

NORTH AMERICA

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97 Ecuador

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AFRICA

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CANADA



SOCIAL AND ECONOMIC INDICATORS

Population (millions): 34.6
 Language: English, French
 Currency: Canadian Dollar (CAD)
 US\$ exchange rate: 1.03
 GDP per capita (US\$): 43,100
 GDP % change: +1.6%
 Total music revenues per capita (US\$): 12.3

INDUSTRY INFORMATION

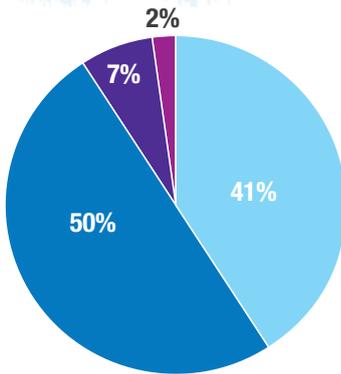
Chart compiler:
 Nielsen SoundScan Canada www.soundscan.com
 Performance rights music licensing company:
 Re:Sound / Connect Music Licensing
www.resound.ca
 Local music industry association:
 Music Canada www.musiccanada.com

DIGITAL INDICATORS IN MILLIONS

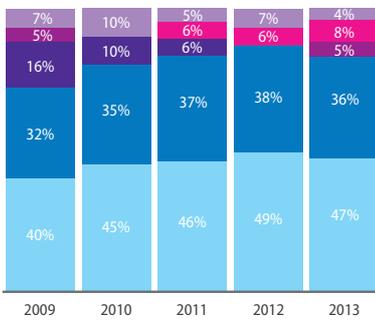
Internet users: 31.1
 Broadband households: 10.9
 Mobile subscriptions: 26.5
 Active smartphones: 17.4
 Active tablets: 9.1

WORLD RANKING

Physical: 6
 Digital: 7
 Performance rights: 10
 Synchronisation: 5
Total market: 7



RECORDED MUSIC SALES BY SECTOR 2013 (VALUE)
 Physical Digital
 Performance rights Synchronisation



DIGITAL SALES BY FORMAT (VALUE)
 Single track Full album
 Mobile Subscriptions
 Ad-supported Other

RECORDED MUSIC REVENUE (US\$ MILLIONS, TRADE VALUE)

	Physical	Digital	Performance rights	Synchronisation revenue	Total (US\$)	Total (CAD)	Total % change
2013	174.5	210.0	29.7	10.0	424.1	436.9	-2.5%
2012	205.4	190.3	28.7	10.5	434.9	447.9	+4.6%
2011	225.8	156.4	18.2	15.5	415.9	428.4	+2.3%
2010	261.5	120.6	19.2	5.3	406.5	418.7	-10.8%
2009	335.5	99.8	20.5		455.8	469.4	-5.4%

RECORDED MUSIC SALES VOLUME (MILLION UNITS)

	Physical		Digital	
	CD	Other physical	Single tracks	Digital albums
2013	20.3	1.9	116.1	11.4
2012	22.5	2.3	114.3	10.5
2011	24.1	2.1	94.2	8.3
2010	25.9	2.9	67.9	6.0
2009	30.8	2.4	58.2	4.9

TOP SELLING SONGS 2013

	Artist	Title	Company
1	Robin Thicke ft. T.I. + Pharrell	Blurred Lines	Universal
2	Avicii	Wake me up!	Universal
3	P!nk ft. Nate Ruess	Just Give Me A Reason	RCA
4	Katy Perry	Roar	Capitol
5	Imagine Dragons	Radioactive	Interscope
6	Lorde	Royals	Universal
7	Macklemore & Ryan Lewis ft. Ray Dalton	Can't Hold Us	Warner
8	Rihanna ft. Mikky Ekko	Stay	Universal
9	Macklemore & Ryan Lewis ft. Wanz	Thrift Shop	Warner
10	The Lumineers	Ho Hey	Dualtone

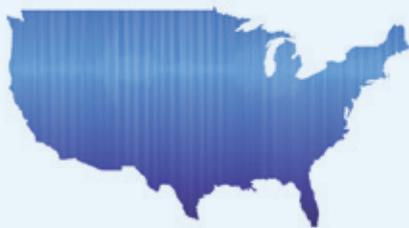
TOP INDEPENDENT LABELS (ALPHABETICAL ORDER)

604 Records Inc.
 Arts & Crafts Productions Inc.
 Dine Alone Music Inc.
 Disques Audiogramme inc. (Les)
 Disques Dare To Care Inc. (Les)
 Groupe Archambault Inc.
 Last Gang Records Inc
 Linus Entertainment Inc.
 Maplecore Ltd.
 Netwerk Productions

TOP SELLING ALBUMS 2013

	Artist	Title	Company
1	Eminem	The Marshall Mathers LP2	Interscope
2	Celine Dion	Loved Me Back To Life	Columbia
3	Imagine Dragons	Night Visions	Interscope
4	Mumford & Sons	Babel	Glassnote
5	P!nk	The Truth About Love	RCA
6	Bruno Mars	Unorthodox Jukebox	Atlantic
7	Justin Timberlake	The 20/20 Experience	RCA
8	The Lumineers	The Lumineers	Dualtone
9	Michael Bublé	To Be Loved	Reprise
10	One Direction	Midnight Memories	Sony

USA



SOCIAL AND ECONOMIC INDICATORS

Population (millions):	316.4
Language:	English
Currency:	US Dollar (USD)
US\$ exchange rate:	1.00
GDP per capita (US\$):	52,800
GDP % change:	+1.6%
Total music revenues per capita (US\$):	14.1

INDUSTRY INFORMATION

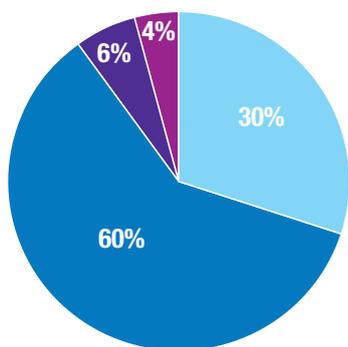
Chart compiler:	Nielsen SoundScan www.soundscan.com
Performance rights music licensing company:	Sound Exchange www.soundexchange.com
Local music industry association:	RIAA www.riaa.com

DIGITAL INDICATORS IN MILLIONS

Internet users:	260.2
Broadband households:	87.6
Mobile subscriptions:	369.9
Active smartphones:	235.7
Active tablets:	103.3

WORLD RANKING

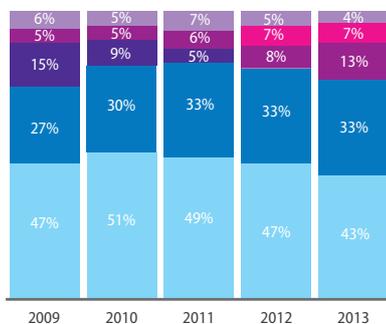
Physical:	2
Digital:	1
Performance rights:	1
Synchronisation:	1
Total market:	1



RECORDED MUSIC SALES BY SECTOR 2013 (VALUE) Physical Digital Performance rights Synch

	Physical	Digital	Performance rights	Synchronisation revenue	Total (US\$)	Total (USD)	Total % change
2013	1,350.0	2,667.8	266.4	189.3	4,473.5	4,473.5	+0.8%
2012	1,504.4	2,579.6	161.2	191.0	4,436.2	4,436.2	-1.3%
2011	1,841.7	2,333.5	130.9	187.8	4,493.9	4,493.9	+3.0%
2010	2,076.4	2,014.4	89.7	181.4	4,362.0	4,362.0	-5.5%
2009	2,553.9	1,989.8	70.2		4,613.8	4,613.8	-10.3%

	Physical		Digital	
	CD	Other physical	Single tracks	Digital albums
2013	172.2	15.0	1,259.3	117.6
2012	198.2	14.4	1,336.0	117.7
2011	240.7	15.0	1,270.0	103.1
2010	252.9	14.8	1,172.2	86.3
2009	292.8	16.4	1,160.0	76.4



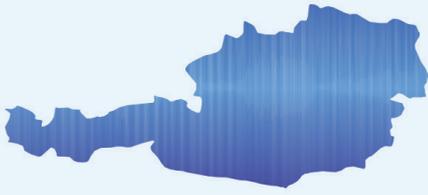
DIGITAL SALES BY FORMAT (VALUE) Single track Full album Mobile Subscriptions Ad-supported Other

	Artist	Title	Company
1	Robin Thicke ft. T.I. + Pharrell	Blurred Lines	Interscope
2	Macklemore & Ryan Lewis ft. Wanz	Thrift Shop	Macklemore
3	Imagine Dragons	Radioactive	Interscope
4	Florida Georgia Line	Cruise	Big Machine
5	Lorde	Royals	Republic
6	Katy Perry	Roar	Capitol
7	P!nk ft. Nate Ruess	Just Give Me A Reason	RCA
8	Macklemore & Ryan Lewis ft. Ray Dalton	Can't Hold Us	Macklemore
9	Bruno Mars	When I Was Your Man	Elektra
10	Rihanna ft. Mikky Ekko	Stay	Def Jam

Big Machine
Concord Records
CURB
E1
Epitaph Records
Koch Entertainment
Madacy
Razor & Tie
Starbucks
Sub Pop
Victory Records
Walt Disney Records/Buena Vista/Hollywood Records

	Artist	Title	Company
1	Justin Timberlake	The 20/20 Experience	RCA
2	Eminem	The Marshall Mathers LP2	Shady Records
3	Luke Bryan	Crash My Party	Capitol
4	Imagine Dragons	Night Visions	Interscope
5	Bruno Mars	Unorthodox Jukebox	Elektra
6	Florida Georgia Line	Here's To The Good Times	Big Machine
7	Drake	Nothing Was The Same	Cash Money
8	Beyoncé	Beyoncé	Columbia
9	Blake Shelton	Based On A True Story	Warner
10	Jay-Z	Magna Carta...Holy Grail	Roc-A-Fella

AUSTRIA



SOCIAL AND ECONOMIC INDICATORS

Population (millions):	8.2
Language:	German
Currency:	Euro (EUR)
US\$ exchange rate:	0.75
GDP per capita (US\$):	42,600
GDP % change:	+0.4%
Total music revenues per capita (US\$):	14.6

INDUSTRY INFORMATION

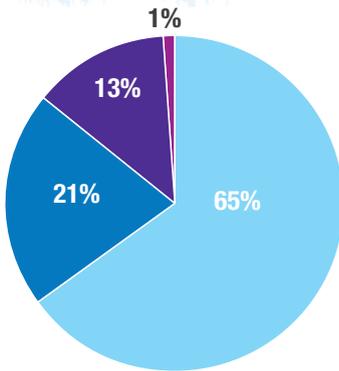
Chart compiler:	Media Control Austria www.austriatop40.at
Performance rights music licensing company:	LSG www.lsg.at
Local music industry association:	IFPI Austria www.ifpi.at

DIGITAL INDICATORS IN MILLIONS

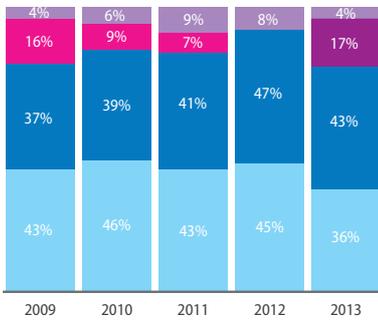
Internet users:	7.0
Broadband households:	2.2
Mobile subscriptions:	13.5
Active smartphones:	4.5
Active tablets:	1.0

WORLD RANKING

Physical:	12
Digital:	23
Performance rights:	14
Synchronisation:	21
Total market:	16



RECORDED MUSIC SALES BY SECTOR 2013 (VALUE) ■ Physical ■ Digital ■ Performance rights ■ Synchronisation



DIGITAL SALES BY FORMAT (VALUE) ■ Single track ■ Full album ■ Subscription ■ Mobile ■ Other

Year	Physical	Digital	Performance rights	Synchronisation revenue	Total (US\$)	Total (EUR)	Total % change
2013	77.5	25.8	15.5	0.9	119.7	89.8	-1.5%
2012	84.4	23.0	13.0	1.0	121.5	91.1	+6.5%
2011	80.1	20.0	12.8	1.2	114.2	85.6	-7.2%
2010	92.9	17.0	12.6	0.5	123.0	92.3	-11.6%
2009	111.0	14.3	13.8		139.1	104.3	-1.5%

Year	Physical		Digital	
	CD	Other physical	Single tracks	Digital albums
2013	6.2	0.7	9.1	1.5
2012	6.8	0.7	10.1	1.4
2011	6.5	0.8	9.9	0.9
2010	7.5	1.0	9.0	0.8
2009	8.4	1.3	6.0	0.6

Rank	Artist	Title	Company
1	Avicii	Wake Me Up	Universal
2	Robin Thicke ft. T.I. + Pharrell	Blurred Lines	Universal
3	Passenger	Let Her Go	Warner
4	Sido	Bilder Im Kopf	Universal
5	Will.i.am feat. Britney spears	Scream & Shout	Universal
6	P!nk feat. Nate Ruess	Just Give Me A Reason	Sony Music
7	Macklemore & Ryan Lewis	Can't Hold Us	Warner
8	Macklemore ft. Ziggy stardust	And We Danced	Warner
9	Wax	Rosana	Warner
10	Macklemore ft. Wanz	Thrift Shop	Warner

Good To Go
Hoanzl
Lotus Records
Major Babies
MCP
MFG
Monkey Music
Napalm Records
Ordis
Preiser
Sonamea Records

Rank	Artist	Title	Company
1	Robbie Williams	Swings Both Ways	Universal
2	Andrea Berg	Atlantis	Sony Music
3	Helene Fischer	Farbenspiel	Universal
4	Andreas Gabalier	Home Sweet Home	Universal
5	Beatrice Egli	Gluecksgefuehle	Universal
6	Helene Fischer	Best Of	Universal
7	Andrea Berg	Abenteuer	Sony Music
8	Kiddy Contest Kids	Kiddy contest vol. 19	Sony Music
9	Andrea Berg	Best Of	Sony Music
10	Semino Rossi	Symphonie Des Lebens	Universal

BELGIUM



SOCIAL AND ECONOMIC INDICATORS

Population (millions): 10.4
 Language: Flemish, French and German
 Currency: Euro (EUR)
 US\$ exchange rate: 0.75
 GDP per capita (US\$): 37,800
 GDP % change: +0.1%
 Total music revenues per capita (US\$): 11.0

INDUSTRY INFORMATION

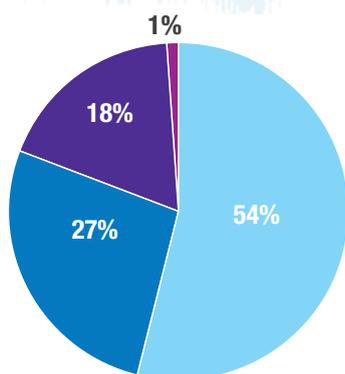
Chart compiler: Ultratop / GfK www.ultratop.be
 Performance rights music licensing company:
 SIMIM www.simim.be
 Local music industry association:
 Belgian Entertainment Association
www.belgianentertainment.be

DIGITAL INDICATORS IN MILLIONS

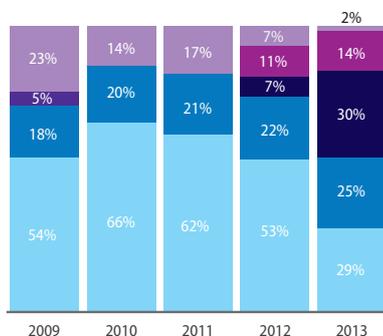
Internet users: 8.9
 Broadband households: 3.4
 Mobile subscriptions: 13.2
 Active smartphones: 4.9
 Active tablets: 1.2

WORLD RANKING

Physical: 16
 Digital: 22
 Performance rights: 12
 Synchronisation: 24
Total market: 18



RECORDED MUSIC SALES BY SECTOR 2013 (VALUE)
 Physical Digital
 Performance rights Synch



DIGITAL SALES BY FORMAT (VALUE)
 Single track Full album
 Mobile Subscriptions
 Ad-supported Other

RECORDED MUSIC REVENUE (US\$ MILLIONS, TRADE VALUE)

	Physical	Digital	Performance rights	Synchronisation revenue	Total (US\$)	Total (EUR)	Total % change
2013	61.6	30.5	21.2	0.8	114.1	85.6	-9.6%
2012	81.2	22.8	21.7	0.5	126.2	94.6	-6.4%
2011	101.1	17.2	16.2	0.4	134.9	101.1	-10.2%
2010	118.0	13.8	17.9	0.5	150.1	112.6	-6.4%
2009	126.2	14.3	19.9		160.4	120.3	-7.0%

RECORDED MUSIC SALES VOLUME (MILLION UNITS)

	Physical		Digital	
	CD	Other physical	Single tracks	Digital albums
2013	8.2	0.4	7.0	2.6
2012	7.2	0.5	9.2	1.2
2011	8.9	0.8	9.3	1.0
2010	10.3	1.0	8.0	0.8
2009	10.7	1.1	5.9	0.6

TOP SELLING SONGS 2013

	Artist	Title	Company
1	Daft Punk ft. Pharrell	Get Lucky	Columbia
2	Avicii	Wake me up!	Universal
3	Robin Thicke ft. T.I. + Pharrell	Blurred Lines	Interscope
4	Martin Garrix	Animals	541/News
5	Stromae	Formidable	Mercury
6	Stromae	Papaoutai	Mercury
7	Will.I.Am ft. Britney Spears	Scream & Shout	Interscope
8	Macklemore & Ryan Lewis ft. Ray Dalton	Can't Hold Us	Macklemore/Warner
9	Macklemore & Ryan Lewis ft. Wanz	Thrift Shop	Macklemore/Warner
10	Passenger	Let Her Go	Embassy Of Music

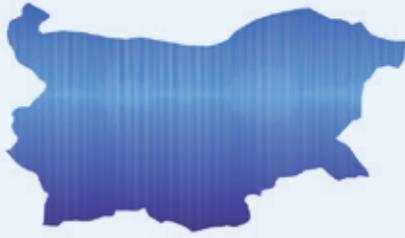
TOP INDEPENDENT LABELS (ALPHABETICAL ORDER)

CNR
 NEWS
 PETROL
 PIAS
 Studio100
 V2

TOP SELLING ALBUMS 2013

	Artist	Title	Company
1	Stromae	Racine Carrée	Mercury
2	Daft Punk	Random Access Memories	Columbia
3	Original Soundtrack	The Broken Circle Breakdown	Universal
4	Bruno Mars	Unorthodox Jukebox	Atlantic
5	Axelle Red	Rouge Ardent	Naïve
6	Adele	21	XL Recordings
7	David Bowie	The Next Day	Columbia
8	Ozark Henry	Stay Gold	Parlophone
9	Celine Dion	Loved Me Back To Life	Columbia
10	Editors	The Weight Of Your Love	PIAS

BULGARIA



SOCIAL AND ECONOMIC INDICATORS

Population (millions): 7.0
 Language: Bulgarian
 Currency: Bulgarian Lev (BGN)
 US\$ exchange rate: 1.48
 GDP per capita (US\$): 14,400
 GDP % change: +0.5%
 Total music revenues per capita (US\$): 0.4

INDUSTRY INFORMATION

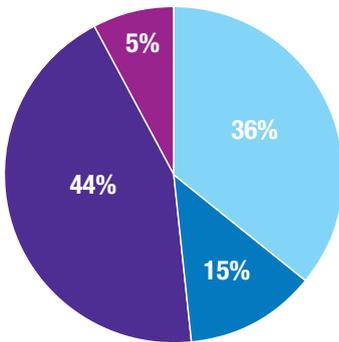
Chart compiler: Prophon
www.prophon.org
 Local music industry association:
 BAMP www.bamp-bg.org

DIGITAL INDICATORS IN MILLIONS

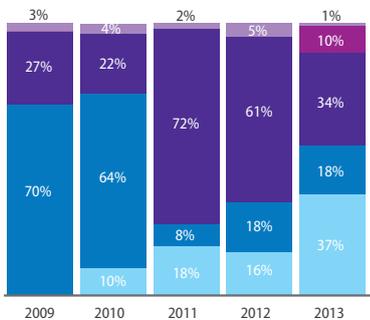
Internet users: 4.2
 Broadband households: 1.1
 Mobile subscriptions: 12.3
 Active smartphones: 4.1

WORLD RANKING

Physical: 50
 Digital: 49
 Performance rights: 45
 Synchronisation: 36
Total market: 52



RECORDED MUSIC SALES BY SECTOR 2013 (VALUE)
 Physical Digital
 Performance rights Synch



DIGITAL SALES BY FORMAT (VALUE)
 Downloads Mobile
 Subscriptions Ad-supported
 Other

RECORDED MUSIC REVENUE (US\$ MILLIONS, TRADE VALUE)

	Physical	Digital	Performance rights	Synchronisation revenue	Total (US\$)	Total (BGN)	Total % change
2013	0.9	0.4	1.1	0.1	2.5	3.7	-19.2%
2012	1.3	0.5	1.2	0.1	3.1	4.6	-13.2%
2011	1.4	0.2	1.9	0.1	3.6	5.3	+78.4%
2010	1.6	0.1	0.2	0.1	2.0	3.0	-67.5%
2009	3.5	0.7	2.0		6.2	9.1	+7.5%

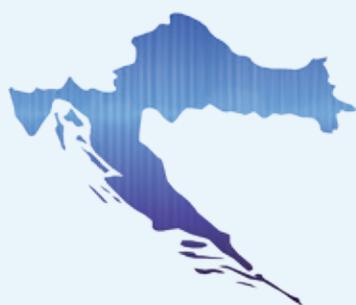
RECORDED MUSIC SALES VOLUME (MILLION UNITS)

	Physical	
	CD	Other physical
2013	0.2	
2012	0.2	
2011	0.2	
2010	0.3	
2009	0.6	0.1

TOP INDEPENDENT LABELS (ALPHABETICAL ORDER)

- Animato Music Ltd
- Ara Music Ltd.
- Diapason Records Ltd
- Monte Music Ltd
- Orpheus Music Ltd
- Payner Ltd
- PolySound Ltd
- Select Music Media Ltd
- StefKos Music Ltd
- StereoRoom Ltd
- Virginia Records Ltd

CROATIA



SOCIAL AND ECONOMIC INDICATORS

Population (millions): 4.5
 Language: Croatian
 Currency: Croatian Kuna (HRK)
 US\$ exchange rate: 5.72
 GDP per capita (US\$): 17,800
 GDP % change: -0.6%
 Total music revenues per capita (US\$): 1.9

INDUSTRY INFORMATION

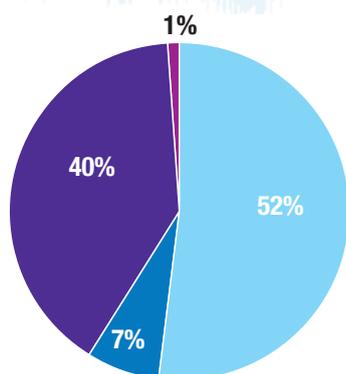
Chart compiler:
 HDU - IFPI Croatia www.hdu-toplista.com
 Performance rights music licensing company:
 ZAPRAF www.zapraf.hr
 Local music industry association:
 HDU - IFPI Croatia www.hdu.hr

DIGITAL INDICATORS IN MILLIONS

Internet users: 2.8
 Broadband households: 0.9

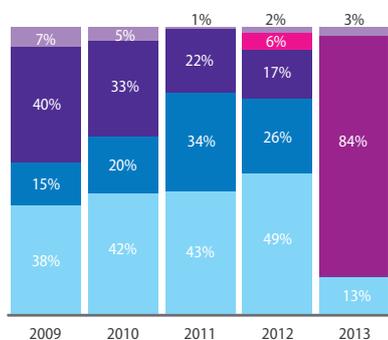
WORLD RANKING

Physical: 44
 Digital: 47
 Performance rights: 33
 Synchronisation: 39
Total market: 45



RECORDED MUSIC SALES BY SECTOR 2013 (VALUE)

Physical Digital Performance rights Synch



DIGITAL SALES BY FORMAT (VALUE)

Single track Full album Master ringtones Subscriptions Ad-supported Other

RECORDED MUSIC REVENUE (US\$ MILLIONS, TRADE VALUE)

	Physical	Digital	Performance rights	Synchronisation revenue	Total (US\$)	Total (HRK)	Total % change
2013	4.5	0.6	3.5	0.1	8.7	49.6	-6.1%
2012	5.1	0.4	3.4	0.3	9.2	52.8	-4.5%
2011	5.9	0.2	3.2	0.3	9.7	55.2	+6.0%
2010	5.8	0.1	3.0	0.1	9.1	52.1	-15.4%
2009	7.8	0.1	2.9		10.8	61.6	-17.8%

RECORDED MUSIC SALES VOLUME (MILLION UNITS)

	Physical	
	CD	Other physical
2013	0.7	
2012	1.0	0.1
2011	1.3	0.1
2010	1.3	0.1
2009	2.4	0.1

TOP SELLING ALBUMS 2013

	Artist	Title	Company
1	Ora Et Labora	Thompson	Croatia Records
2	Tišina Mora	Oliver Dragojević	Aquarius Records
3	Dobrodošao U Klub	Severina	Dallas Records
4	20th Century Man	Gibonni	Dallas Records/Mala Vrata
5	100 Originalnih Hitova - Mišo Kovač	Mišo Kovač	Croatia Records
6	100 Originalnih Hitova: Oliver Dragojević	Oliver Dragojević	Croatia Records
7	Tvoj Ču OSTATI	Dražen Zečić	Croatia Records
8	CMC Festival Vodice 2013	Various Artists	Croatia Records
9	40 Najvećih Klapskih Hitova	Various Artists	Scardona
10	Festival Zabavne Glazbe - Split 2013	Various Artists	Croatia Records

TOP INDEPENDENT LABELS (ALPHABETICAL ORDER)

Aquarius Records
 Cantus
 Croatia Records
 Dallas Records
 Dancing Bear
 Hit records
 Menart
 Orfej
 Scardona

CZECH REPUBLIC



SOCIAL AND ECONOMIC INDICATORS

Population (millions):	10.5
Language:	Czech
Currency:	Czech Koruna (CZK)
US\$ exchange rate:	19.57
GDP per capita (US\$):	27,200
GDP % change:	-0.4%
Total music revenues per capita (US\$):	2.1

INDUSTRY INFORMATION

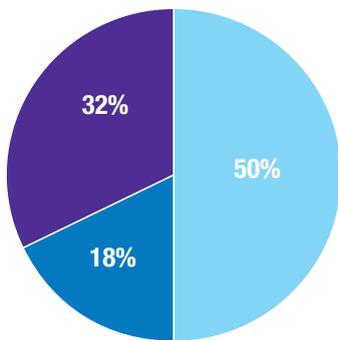
Chart compiler:	IFPI Czech Republic www.ifpicr.cz
Performance rights music licensing company:	Intergram www.intergram.cz
Local music industry association:	IFPI Czech Republic www.ifpicr.cz

DIGITAL INDICATORS IN MILLIONS

Internet users:	8.2
Broadband households:	2.2
Mobile subscriptions:	14.2
Active smartphones:	6.0
Active tablets:	0.6

WORLD RANKING

Physical:	37
Digital:	41
Performance rights:	24
Synchronisation:	44
Total market:	37

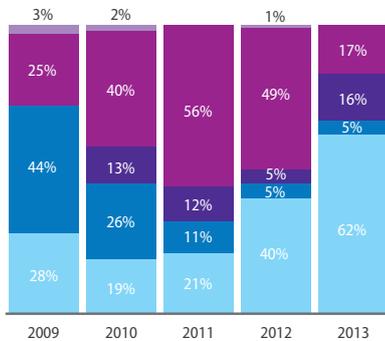


RECORDED MUSIC SALES BY SECTOR 2013 (VALUE)

	Physical	Digital	Performance rights	Synchronisation revenue	Total (US\$)	Total (CZK)	Total % change
2013	11.0	3.9	7.0		21.9	428.4	-0.1%
2012	12.6	3.2	5.8	0.4	21.9	428.7	-4.5%
2011	15.0	1.7	5.9	0.3	22.9	448.8	-14.2%
2010	18.8	1.1	6.7	0.1	26.7	522.8	-20.0%
2009	26.6	1.0	5.8		33.4	653.2	-8.2%

RECORDED MUSIC SALES VOLUME (MILLION UNITS)

	Physical	
	CD	Other physical
2013	1.7	0.1
2012	2.0	0.2
2011	3.0	0.6
2010	4.9	0.1
2009	8.8	0.2



DIGITAL SALES BY FORMAT (VALUE)

TOP SELLING ALBUMS 2013

	Artist	Title	Company
1	Nohavica Jarek	Tak Mě Tu Máš	Petarda Production
2	Kryštof	Inzerát	Universal Music
3	Veselá Trojka	Už Nám Kamarádi	Česká Muzika
4	Veselá Trojka	Parta Veselá	Česká Muzika
5	Gott Karel	Láska Je Nádhera (Dotek Lásky 2)	Supraphon
6	Nohavica Jarek	Tenkrát	Warner Music
7	Kučerovci	To Nejlepší	Supraphon
8	Vondráčková Lucie	Oheň	BrainZone
9	Malásek Jiří	Romantický Klavír 1973 - 1983	Supraphon
10	Matuška Waldemar	Růže Z Texasu	Supraphon

TOP INDEPENDENT LABELS (ALPHABETICAL ORDER)

- 100 PROMOTION
- BEST I.A.
- BrainZone
- Championship Music
- Good Day Records
- Indies MG
- Multisonic
- Popron
- Supraphon

DENMARK



SOCIAL AND ECONOMIC INDICATORS

Population (millions): 5.6
 Language: Danish
 Currency: Danish Krone (DKK)
 US\$ exchange rate: 5.62
 GDP per capita (US\$): 37,800
 GDP % change: +0.1%
 Total music revenues per capita (US\$): 17.0

INDUSTRY INFORMATION

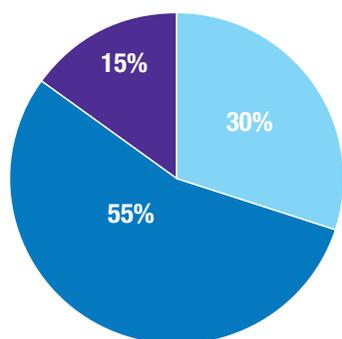
Chart compiler:
 M&I Service www.hitlisten.nu
 Performance rights music licensing company:
 Gramex www.gramex.dk
 Local music industry association:
 IFPI Denmark www.ifpi.dk

DIGITAL INDICATORS IN MILLIONS

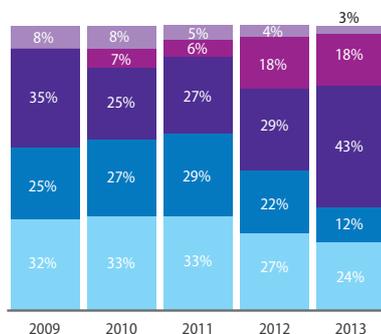
Internet users: 5.1
 Broadband households: 1.9
 Mobile subscriptions: 9.4
 Active smartphones: 4.7
 Active tablets: 0.8

WORLD RANKING

Physical: 25
 Digital: 17
 Performance rights: 15
 Synchronisation: 40
Total market: 20



RECORDED MUSIC SALES BY SECTOR 2013 (VALUE)



DIGITAL SALES BY FORMAT (VALUE)

RECORDED MUSIC REVENUE (US\$ MILLIONS, TRADE VALUE)

	Physical	Digital	Performance rights	Synchronisation revenue	Total (US\$)	Total (DKK)	Total % change
2013	28.4	52.0	14.5	0.1	95.0	534.0	+4.7%
2012	35.1	41.3	14.0	0.3	90.8	510.2	-5.4%
2011	50.3	31.2	13.9	0.6	96.0	539.3	-4.1%
2010	61.0	25.5	12.9	0.6	100.1	562.5	-12.2%
2009	78.0	23.2	12.8		114.0	640.6	-3.2%

RECORDED MUSIC SALES VOLUME (MILLION UNITS)

	Physical		Digital	
	CD	Other physical	Single tracks	Digital albums
2013	2.8	0.2	6.4	1.1
2012	3.6	0.1	8.7	1.3
2011	5.2		9.0	1.3
2010	6.4	0.2	7.8	1.1
2009	7.1	0.2	7.1	0.8

TOP SELLING SONGS 2013

	Artist	Title	Company
1	Avicii	Wake Me Up!	Universal
2	Passenger	Let Her Go	Sony
3	Robin Thicke ft. T.I. + Pharrell	Blurred Lines	Universal
4	Daft Punk ft. Pharrell	Get Lucky	Sony
5	Marie Key	Uden Forsvar	Sony
6	Rasmus Seebach	Olivia	Artepeople
7	P!nk ft. Nate Ruess	Just Give Me A Reason	Sony
8	Panamah	Børn Af Natten	Universal
9	Macklemore & Ryan Lewis ft. Wanz	Thrift Shop	Macklemore/Warner
10	Rihanna ft. Mikky Ekko	Stay	Universal

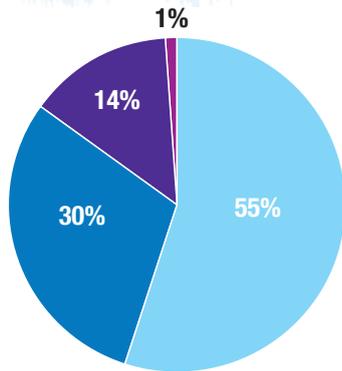
TOP INDEPENDENT LABELS (ALPHABETICAL ORDER)

ArtPeople
 disco:wax
 Labelmade
 Playground
 Target

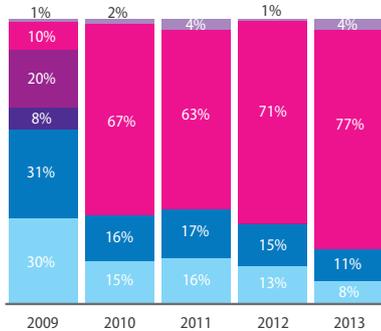
TOP SELLING ALBUMS 2013

	Artist	Title	Company
1	Rasmus Seebach	Ingen Kan Love Dig I Morgen	Artepeople
2	Various Artists	M:G:P 2013	Universal
3	Marie Key	De Her Dage	Sony
4	One Direction	Midnight Memories	Sony
5	Volbeat	Outlaw Gentlemen & Shady Ladies	Universal
6	Mads Langer	In These Waters	Sony
7	Allan Olsen	Jøwt	Zoobaba
8	Burhan G	Din For Evigt	Copenhagen Records/Universal
9	Thomas Helmig	KH Helmig	Sony
10	Robbie Williams	Swings Both Ways	Universal

FINLAND



RECORDED MUSIC SALES BY SECTOR 2013 (VALUE)



DIGITAL SALES BY FORMAT (VALUE)

SOCIAL AND ECONOMIC INDICATORS

Population (millions): 5.3
 Language: Finnish
 Currency: Euro (EUR)
 US\$ exchange rate: 0.75
 GDP per capita (US\$): 35.900
 GDP % change: -0.6%
 Total music revenues per capita (US\$): 12.9

DIGITAL INDICATORS IN MILLIONS

Internet users: 5.0
 Broadband households: 1.7
 Mobile subscriptions: 9.7
 Active smartphones: 5.1
 Active tablets: 0.8

INDUSTRY INFORMATION

Chart compiler: IFPI Finland / Ranger Computers
 Official Finnish Chart www.suomenvirallinenlista.fi
 Official Finnish Download Chart www.latauslista.fi

Performance rights music licensing company:
 Gramex / IFPI Finland www.gramex.fi

Local music industry association:
 IFPI Finland www.ifpi.fi

WORLD RANKING

Physical: 21
 Digital: 27
 Performance rights: 20
 Synchronisation: 30
Total market: 25

RECORDED MUSIC REVENUE (US\$ MILLIONS, TRADE VALUE)

	Physical	Digital	Performance rights	Synchronisation revenue	Total (US\$)	Total (EUR)	Total % change
2013	37.6	20.4	9.5	0.4	67.9	50.9	-4.2%
2012	43.0	15.8	11.9	0.2	70.8	53.1	+2.5%
2011	46.5	11.2	10.9	0.5	69.1	51.8	-2.0%
2010	49.4	10.9	9.9	0.4	70.5	52.9	-2.7%
2009	58.6	5.6	8.3		72.5	54.4	-16.6%

RECORDED MUSIC SALES VOLUME (MILLION UNITS)

	Physical		Digital	
	CD	Other physical	Single tracks	Digital albums
2013	3.7	0.2	1.4	0.3
2012	4.8	0.2	2.3	0.3
2011	4.9	0.2	1.9	0.3
2010	5.2	0.4	1.2	0.2
2009	5.1	0.5	1.3	0.2

TOP SELLING SONGS 2013

	Artist	Title	Company
1	Avicii	Wake Me Up	Universal
2	Daft Punk	Get Lucky	Sony
3	Rihanna	Diamonds	Universal
4	Haloo Helsinki!	Vapaus kateen jaa	Sony
5	Cheek	Timantit on ikuisia	Warner Music
6	Sini Sabotage	Levikset repee (feat. VilliGalle)	Warner Music
7	J. Karjalainen	Mennyt mies	Warner Music
8	Pink	Just Give Me A Reason	Sony
9	Will.I.Am	Scream & Shout	Universal
10	Passenger	Let Her Go	Sony

TOP INDEPENDENT LABELS (ALPHABETICAL ORDER)

AXR Music
 FG-Naxos
 Playground Music
 VL Media

TOP SELLING ALBUMS 2013

	Artist	Title	Company
1	Various Artists	Vain Elämää - Kausi 2	Warner
2	Robin	Boom Kah	Universal
3	Various Artists	Vain Elämää - Kausi 2 Jatkuu	Warner
4	Cheek	Kuka Muu Muka	Warner
5	Jenni Vartiainen	Terra	Warner
6	Juha Tapio	Lapislatsulia	Kaiku
7	J. Karjalainen	Et Ole Yksin	Warner
8	Cheek	Sokka Irti	Warner
9	Suvi Teräsniiska	Hän Tanssi Kanssa Enkeleiden	Warner
10	Various Artists	Vain Elämää Jatkuu	Warner

FRANCE



SOCIAL AND ECONOMIC INDICATORS

Population (millions):	66.0
Language:	French
Currency:	Euro (EUR)
US\$ exchange rate:	0.75
GDP per capita (US\$):	35,700
GDP % change:	+0.2%
Total music revenues per capita (US\$):	14.5

INDUSTRY INFORMATION

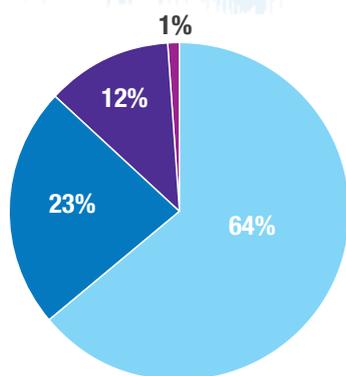
Chart compiler:	SNEP / GfK www.snepmusique.com/fr
Performance rights music licensing company:	SCCP www.scpp.fr/SCCP
Local music industry association:	SNEP www.disqueenfrance.com

DIGITAL INDICATORS IN MILLIONS

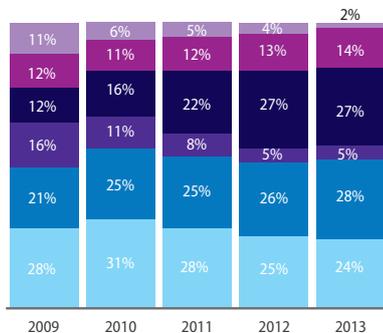
Internet users:	51.1
Broadband households:	17.8
Mobile subscriptions:	67.3
Active smartphones:	41.8
Active tablets:	10.9

WORLD RANKING

Physical:	4
Digital:	6
Performance rights:	3
Synchronisation:	4
Total market:	5



RECORDED MUSIC SALES BY SECTOR 2013 (VALUE) ■ Physical ■ Digital ■ Performance rights ■ Synch



DIGITAL SALES BY FORMAT (VALUE) ■ Single track ■ Full album ■ Mobile ■ Subscriptions ■ Ad-supported ■ Other

	Physical	Digital	Performance rights	Synchronisation revenue	Total (US\$)	Total (EUR)	Total % change
2013	608.6	220.0	112.5	15.1	956.2	717.1	+1.3%
2012	603.9	218.8	98.6	22.6	943.9	707.9	-2.9%
2011	679.2	194.1	81.6	17.0	972.0	729.0	-2.7%
2010	758.3	146.6	78.1	15.6	998.6	749.0	-3.1%
2009	822.7	128.7	79.4		1,030.8	773.1	-1.0%

	Physical		Digital	
	CD	Other physical	Single tracks	Digital albums
2013	48.9	3.0	40.5	7.3
2012	48.6	3.9	44.1	7.6
2011	53.9	4.5	43.0	6.5
2010	57.2	6.1	33.4	5.3
2009	59.5	7.6	27.8	3.9

	Artist	Title	Company
1	Daft Punk ft. Pharrell	Get Lucky	Sony
2	Robin Thicke ft. T.I. + Pharrell	Blurred Lines	Polydor
3	Stromae	Papaoutai	Island
4	Macklemore & Ryan Lewis ft. Wanz	Thrift Shop	Warner
5	Stromae	Formidable	Island
6	Avicii	Wake Me Up!	Universal
7	Bruno Mars	Locked Out Of Heaven	Grammy Recordings/Atlantic
8	Macklemore & Ryan Lewis ft. Ray Dalton	Can't Hold Us	Warner
9	Maître Gims	J'me Tire	Jive Epic
10	Maître Gims	Bella	Jive Epic

Believe
Harmonia Mundi
Naïve
PIAS
Wagram

	Artist	Title	Company
1	Stromae	Racine Carrée	Island/Universal
2	Daft Punk	Random Access Memories	Columbia
3	Maître Gims	Subliminal	Jive Epic
4	Les Enfoirés	La Boite À Musique Des Enfoirés	Columbia
5	Bruno Mars	Unorthodox Jukebox	Atlantic
6	Zaz	Recto Verso	Play On
7	Christophe Maé	Je Veux Du Bonheur	Warner
8	Various Artists	Generation Goldman	My Major Company
9	Florent Pagny	Vieillir Avec Toi	AZ
10	Various Artists	Robin Des Bois	Parlophone

GERMANY



SOCIAL AND ECONOMIC INDICATORS

Population (millions): 81.1
 Language: German
 Currency: Euro (EUR)
 US\$ exchange rate: 0.75
 GDP per capita (US\$): 39,500
 GDP % change: +0.5%
 Total music revenues per capita (US\$): 16.8

INDUSTRY INFORMATION

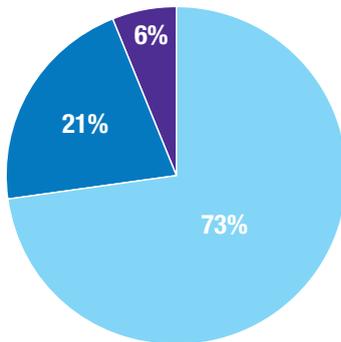
Chart compiler:
 Media Control® GfK International www.musicline.de
 Performance rights music licensing company:
 GVL www.gvl.de
 Local music industry association:
 Bundesverband Musikindustrie (IFPI Germany)
www.musikindustrie.de

DIGITAL INDICATORS IN MILLIONS

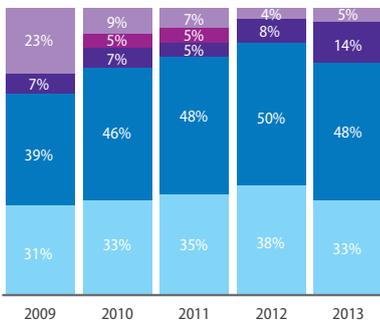
Internet users: 69.0
 Broadband households: 25.1
 Mobile subscriptions: 114.5
 Active smartphones: 51.9
 Active tablets: 13.8

WORLD RANKING

Physical: 3
 Digital: 4
 Performance rights: 5
 Synchronisation: 7
Total market: 3



RECORDED MUSIC SALES BY SECTOR 2013 (VALUE)
 ■ Physical ■ Digital ■ Performance rights



DIGITAL SALES BY FORMAT (VALUE)
 ■ Single track ■ Full album ■ Subscriptions ■ Ad-supported ■ Other

	Physical	Digital	Performance rights	Synchronisation revenue	Total (US\$)	Total (EUR)	Total % change
2013	999.7	281.2	77.2	7.2	1,365.1	1,023.9	+1.1%
2012	1,014.6	258.1	67.5	9.6	1,349.8	1,012.3	-4.6%
2011	1,099.4	216.4	91.7	7.3	1,414.8	1,061.1	-0.2%
2010	1,143.0	178.2	91.0	5.0	1,417.2	1,062.9	-3.7%
2009	1,246.0	149.3	76.8		1,472.1	1,104.1	-2.9%

	Physical		Digital	
	CD	Other physical	Single tracks	Digital albums
2013	88.0	9.6	92.8	18.7
2012	92.8	10.9	97.1	17.5
2011	96.9	13.1	79.0	14.6
2010	98.7	16.3	63.3	10.7
2009	103.3	17.5	49.2	7.6

	Artist	Title	Company
1	Avicii	Wake Me Up!	Universal
2	Robin Thicke ft. T.I. + Pharrell	Blurred Lines	Universal
3	Will.I.Am ft. Britney Spears	Scream & Shout	Universal
4	Daft Punk ft. Pharrell	Get Lucky	Sony
5	Passenger	Let Her Go	Warner
6	Macklemore & Ryan Lewis ft. Ray Dalton	Can't Hold Us	Warner
7	Macklemore & Ryan Lewis ft. Wanz	Thrift Shop	Warner
8	Capital Cities	Safe And Sound	Universal
9	Imagine Dragons	Radioactive	Universal
10	Naughty Boy ft. Sam Smith	La La La	Universal

Alive
Cargo Records
Edel / Kontor
GoodToGo
H'ART
Indigo
Kiddinx
MCP
Naxos
Soulfood
SPV
Tonpool

	Artist	Title	Company
1	Helene Fischer	Farbenspiel	Universal
2	Robbie Williams	Swings Both Ways	Universal
3	Andrea Berg	Atlantis	Sony
4	Santiano	Mit Den Gezeiten	Universal
5	Andrea Berg	Abenteuer	Sony
6	Helene Fischer	Best Of	Universal
7	Depeche Mode	Delta Machine	Sony
8	Volbeat	Outlaw Gentlemen & Shady Ladies	Universal
9	Santiano	Bis Ans Ende Der Welt	Universal
10	Heino	Mit Freundlichen Grüßen	Sony

GREECE



SOCIAL AND ECONOMIC INDICATORS

Population (millions): 10.7
 Language: Greek
 Currency: Euro (EUR)
 US\$ exchange rate: 0.75
 GDP per capita (US\$): 23,600
 GDP % change: -4.2%
 Total music revenues per capita (US\$): 1.6

INDUSTRY INFORMATION

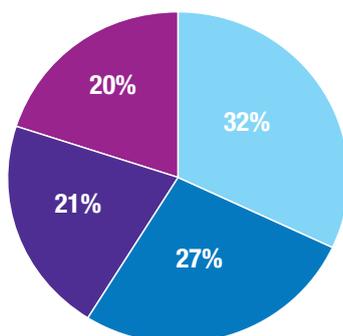
Chart compiler: IFPI Greece
www.ifpi.gr
 Performance rights music licensing company:
 GEA www.geamusic.gr
 Local music industry association:
 IFPI Greece www.ifpi.gr

DIGITAL INDICATORS IN MILLIONS

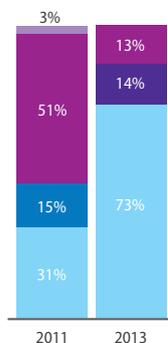
Internet users: 6.9
 Broadband households: 2.1
 Mobile subscriptions: 15.6
 Active smartphones: 5.5
 Active tablets: 0.5

WORLD RANKING

Physical: 42
 Digital: 40
 Performance rights: 32
 Synchronisation: 9
Total market: 40



RECORDED MUSIC SALES BY SECTOR 2013 (VALUE)



DIGITAL SALES BY FORMAT (VALUE)

RECORDED MUSIC REVENUE (US\$ MILLIONS, TRADE VALUE)							
	Physical	Digital	Performance rights	Synchronisation revenue	Total (US\$)	Total (EUR)	Total % change
2013	5.5	4.8	3.6	3.4	17.3	13.0	+20.0%
2012	6.5	4.9	3.0		14.4	10.8	-5.1%
2011	5.7	4.7	4.8		15.2	11.4	+62.4%
2010		5.2	4.1		9.4	7.0	+49.7%
2009			6.3		6.3	4.7	+25.8%

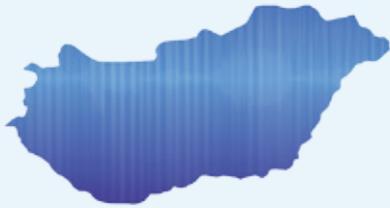
RECORDED MUSIC SALES VOLUME (MILLION UNITS)			
	Physical		Digital
	CD	Other physical	Single tracks
2013	0.8		0.3
2012			
2011	1.2	0.1	
2010	4.4	0.2	
2009	6.2	0.2	

TOP SELLING ALBUMS 2013			
	Artist	Title	Company
1	Ploutarhos Giannis	Kato Ap'ton Idio Ilio	Heaven
2	Remos Antonis	I Kardia Me Pigainei Emena	Heaven
3	Pantelidis Pantelis	Ouranio Toxo Pou Tou Leipane 2 Hromata	Minos-EMI/Universal
4	Sfakianakis Notis	16 Aftoteleis Istories	Cobalt
5	Paola	Live Meta Ta Mesanyhta	Heaven
6	Zouganeli Eleonora	Metakomisi Tora	Minos-EMI/Universal
7	Pantelidis Pantelis	Alkoolikes Oi Nyhtes	Minos-EMI/Universal
8	Oikonomopoulos Nikos	Eiilikrina	Minos-EMI/Universal
9	Paparizou Elena	Ti Ora Tha Vgoume	Minos-EMI/Universal
10	Vertis Nikos	Protaseis	Cobalt

TOP INDEPENDENT LABELS (ALPHABETICAL ORDER)

Alpha Records
 Cobalt Music/Helladisc
 Heaven Music
 Panik Music Group
 Spicy Records

HUNGARY



SOCIAL AND ECONOMIC INDICATORS

Population (millions): 9.9
 Language: Hungarian
 Currency: Hungarian Forint (HUF)
 US\$ exchange rate: 223.82
 GDP per capita (US\$): 19,800
 GDP % change: +0.2%
 Total music revenues per capita (US\$): 1.6

INDUSTRY INFORMATION

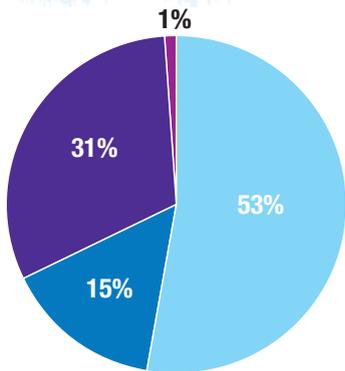
Chart compiler: MAHASZ www.mahasz.hu
 Performance rights music licensing company:
 MAHASZ www.mahasz.hu
 Local music industry association:
 MAHASZ www.mahasz.hu

DIGITAL INDICATORS IN MILLIONS

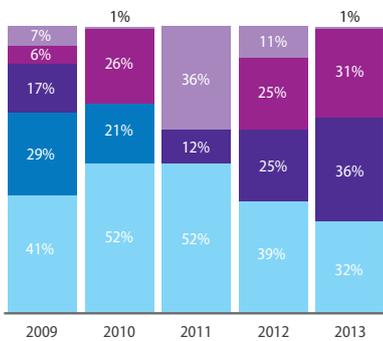
Internet users: 7.6
 Broadband households: 2.4
 Mobile subscriptions: 10.7
 Active smartphones: 3.9

WORLD RANKING

Physical: 40
 Digital: 43
 Performance rights: 30
 Synchronisation: 32
Total market: 41



RECORDED MUSIC SALES BY SECTOR 2013 (VALUE)
 Physical Digital
 Performance rights Synch



DIGITAL SALES BY FORMAT (VALUE)
 Downloads Mobile
 Subscriptions Ad-supported
 Other

RECORDED MUSIC REVENUE (US\$ MILLIONS, TRADE VALUE)

	Physical	Digital	Performance rights	Synchronisation revenue	Total (US\$)	Total (HUF)	Total % change
2013	8.4	2.3	4.8	0.2	15.7	3,516.8	-1.9%
2012	9.7	1.5	4.7	0.1	16.0	3,583.9	-12.8%
2011	12.4	1.3	4.6		18.4	4,109.5	-7.5%
2010	14.5	0.5	4.9		19.8	4,441.5	-15.1%
2009	17.6	0.9	4.8		23.4	5,234.3	-8.7%

RECORDED MUSIC SALES VOLUME (MILLION UNITS)

	Physical	
	CD	Other physical
2013	1.6	0.1
2012	1.8	0.1
2011	2.1	0.3
2010	3.6	0.2
2009	3.6	0.2

TOP SELLING ALBUMS 2013

	Artist	Title	Company
1	Tankcsapda	Rockmafia Debrecen	Tankcsapda Music
2	Hooligans	História	Hear Hungary
3	Tankcsapda	Igazi Hiénák	Tankcsapda Music
4	Ákos	2084 Turné	Fehér Súlyom/Magneoton
5	Road	Tegyük fel	Hammer Music
6	Tankcsapda	A Legjobb Méreg	Tankcsapda Music
7	Rúzsza Magdolna	Tizenegy	Magneoton
8	Tankcsapda	Jönnek A Férgék	Tankcsapda Music
9	Tankcsapda	Az Ember Tervez	Tankcsapda Music
10	Zorán	Egypár Barát	Universal Music

TOP INDEPENDENT LABELS (ALPHABETICAL ORDER)

CLS/Egység Média
 Fehér Súlyom
 Fonó Records
 Fotexnet (Hungaroton)
 Hammer Music
 Megadó
 mTon
 Retro Media/Grund Records
 Tankcsapda
 Tom-Tom Records

IRELAND



SOCIAL AND ECONOMIC INDICATORS

Population (millions): 4.8
 Language: English
 Currency: Euro (EUR)
 US\$ exchange rate: 0.75
 GDP per capita (US\$): 41,300
 GDP % change: +0.6%
 Total music revenues per capita (US\$): 9.5

INDUSTRY INFORMATION

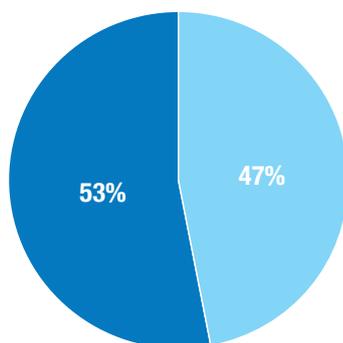
Chart compiler: IRMA / GfK Chart-Track
www.irma.ie / www.chart-track.co.uk
 Performance rights music licensing company:
 PPI www.ppimusic.ie
 Local music industry association:
 IRMA www.irma.ie

DIGITAL INDICATORS IN MILLIONS

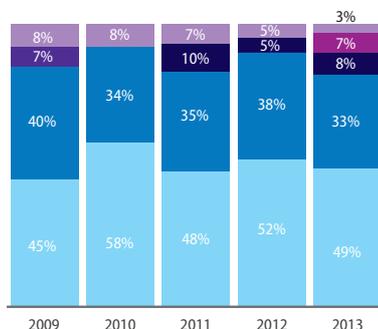
Internet users: 3.8
 Broadband households: 1.0
 Mobile subscriptions: 5.3
 Active smartphones: 3.3
 Active tablets: 0.6

WORLD RANKING

Physical: 32
 Digital: 25
 Synchronisation: 37
Total market: 31



RECORDED MUSIC SALES BY SECTOR 2013 [VALUE]



DIGITAL SALES BY FORMAT [VALUE]

RECORDED MUSIC REVENUE (US\$ MILLIONS, TRADE VALUE)							
	Physical	Digital	Performance rights	Synchronisation revenue	Total (US\$)	Total (EUR)	Total % change
2013	18.4	20.9		0.1	39.5	29.6	-8.9%
2012	26.2	17.1			43.3	32.5	-13.7%
2011	33.4	16.6		0.2	50.2	37.6	-15.1%
2010	45.4	13.5		0.2	59.1	44.3	-16.6%
2009	58.5	12.4			70.9	53.2	-26.0%

RECORDED MUSIC SALES VOLUME (MILLION UNITS)				
	Physical		Digital	
	CD	Other physical	Single tracks	Digital albums
2013	1.9	0.1	6.2	1.1
2012	3.0	0.3	7.3	1.1
2011	4.0	0.2	6.9	0.9
2010	4.9	0.4	6.1	0.8
2009	6.3	0.5	5.6	0.7

TOP SELLING SONGS 2013			
	Artist	Title	Company
1	Robin Thicke ft. T.I. + Pharrell	Blurred Lines	Interscope
2	Passenger	Let Her Go	Nettwerk
3	Avicii	Wake me up!	Positiva
4	Daft Punk ft. Pharrell	Get Lucky	Columbia
5	P!nk ft. Nate Ruess	Just Give Me A Reason	RCA
6	Bastille	Pompeii	Virgin
7	Macklemore & Ryan Lewis ft. Wanz	Thrift Shop	Macklemore
8	Lumineers	Ho Hey	Decca
9	Katy Perry	Roar	Virgin
10	Macklemore & Ryan Lewis ft. Ray Dalton	Can't Hold Us	Macklemore

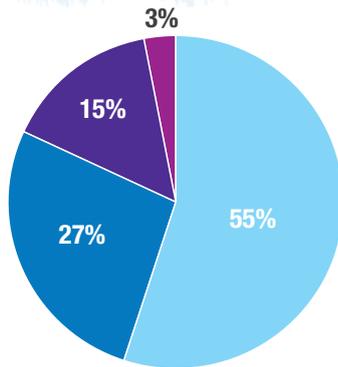
TOP INDEPENDENT LABELS [ALPHABETICAL ORDER]

4AD
Celtic airs
Dolphin
Domino
Greatest Ever
Macklemore
Ministry Of Sound
Nettwerk
Sharpe
XI Recordings

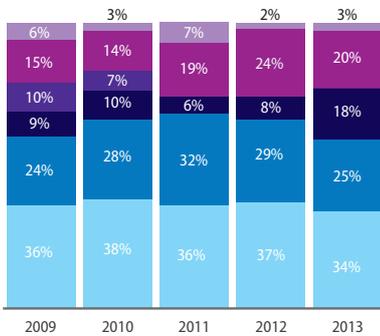
TOP SELLING ALBUMS 2013

	Artist	Title	Company
1	Various Artists	Now That's What I Call Music 86	Sony/Universal
2	One Direction	Midnight Memories	SYCO
3	Emeli Sandé	Our Version Of Events	Virgin
4	Various Artists	Now That's What I Call Music 85	Sony/Universal
5	Various Artists	Now That's What I Call Music 84	Sony/Universal
6	Kodaline	In A Perfect World	B-Unique
7	Michael Bublé	To Be Loved	Reprise
8	Eminem	The Marshall Mathers LP2	Interscope
9	One Direction	Take Me Home	SYCO
10	Bruno Mars	Unorthodox Jukebox	Atlantic

ITALY



RECORDED MUSIC SALES BY SECTOR 2013 (VALUE) ■ Physical ■ Digital ■ Performance rights ■ Synchronisation



DIGITAL SALES BY FORMAT (VALUE) ■ Single track ■ Full album ■ Mobile ■ Subscriptions ■ Ad-supported ■ Other

SOCIAL AND ECONOMIC INDICATORS

Population (millions):	61.5
Language:	Italian
Currency:	Euro (EUR)
US\$ exchange rate:	0.75
GDP per capita (US\$):	29,600
GDP % change:	-1.8%
Total music revenues per capita (US\$):	3.9

INDUSTRY INFORMATION

Chart compiler:	GfK Media Control www.fimi.it
Performance rights music licensing company:	SCF www.scfitalia.it
Local music industry association:	FIMI www.fimi.it

DIGITAL INDICATORS IN MILLIONS

Internet users:	37.7
Broadband households:	11.7
Mobile subscriptions:	92.1
Active smartphones:	45.2
Active tablets:	4.9

WORLD RANKING

Physical:	8
Digital:	15
Performance rights:	6
Synchronisation:	8
Total market:	8

RECORDED MUSIC REVENUE (US\$ MILLIONS, TRADE VALUE)

	Physical	Digital	Performance rights	Synchronisation revenue	Total (US\$)	Total (EUR)	Total % change
2013	132.6	64.1	35.4	6.7	238.8	179.1	+8.3%
2012	139.3	54.6	20.9	5.7	220.6	165.4	-9.7%
2011	177.8	40.1	20.0	6.4	244.3	183.2	+1.2%
2010	177.7	31.8	23.1	8.8	241.4	181.1	+1.0%
2009	183.6	29.4	26.0		239.0	179.2	-18.1%

RECORDED MUSIC SALES VOLUME (MILLION UNITS)

	Physical		Digital	
	CD	Other physical	Single tracks	Digital albums
2013	13.6	0.6	19.2	2.3
2012	13.6	0.7	20.4	2.4
2011	16.9	0.6	15.0	1.9
2010	16.0	1.9	12.4	
2009	16.6	1.5	11.2	

TOP SELLING SONGS 2013

	Artist	Title	Company
1	Daft Punk ft. Pharrell	Get Lucky	Columbia/Sony
2	Avicii	Wake me up!	PM:AM/Universal
3	Marco Mengoni	L'Essenziale	RCA/Sony
4	Robin Thicke ft. T.I. + Pharrell	Blurred Lines	Universal
5	P!nk ft. Nate Ruess	Just Give Me A Reason	RCA/Sony
6	Will.I.Am ft. Britney Spears	Scream & Shout	Interscope/Universal
7	Lykke Li	I Follow Rivers	Atlantic/Warner
8	Imany	You Will Never Know	Time/Kiver
9	David Guetta ft. Ne-Yo & Akon	Play Hard	Parlophone/Warner
10	Bastille	Pompeii	Virgin/Universal

TOP INDEPENDENT LABELS (ALPHABETICAL ORDER)

Carosello
Edel
Naxos
Retro Gold
Roadrunner
Solo Musica Italiana
Sugar Music
Tanta Roba Label
Tattica
Time
Ultrasuoni

TOP SELLING ALBUMS 2013

	Artist	Title	Company
1	Ligabue	Mondovisione	Zoo Aperto/Warner
2	Modà	Gioia... Non E' Mai Abbastanza!	Ultrasuoni
3	Jovanotti	Backup 1987-2012 Il Best	Universal
4	Moreno	Stecca	Universal
5	Emma	Schiena vs. Schiena	Universal
6	Fedez	Sig. Brainwash - L'Arte Di Accontentare	Epic/Sony
7	Maco Mengoni	#Prontoacorriereilviaggio	RCA/RLG/Sony
8	One Direction	Midnight Memories	Syco/Sony
9	Laura Pausini	20 The Greatest Hits	Atlantic/Warner
10	Max Pezzali	Max 20	Atlantic/Warner

NETHERLANDS



SOCIAL AND ECONOMIC INDICATORS

Population (millions): 16.8
 Language: Dutch
 Currency: Euro (EUR)
 US\$ exchange rate: 0.75
 GDP per capita (US\$): 41,400
 GDP % change: -1.3%
 Total music revenues per capita (US\$): 12.2

INDUSTRY INFORMATION

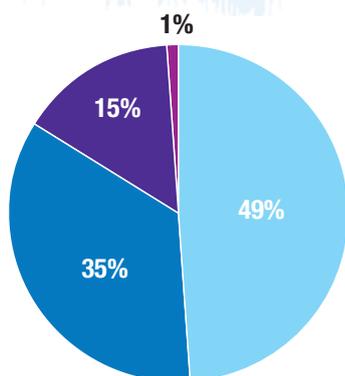
Chart compiler: GfK Megacharts BV
www.dutchcharts.nl
 Performance rights music licensing company:
 SENA www.sena.nl
 Local music industry association:
 NVPI www.nvpi.nl

DIGITAL INDICATORS IN MILLIONS

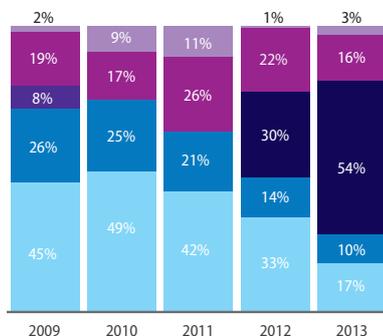
Internet users: 15.5
 Broadband households: 5.8
 Mobile subscriptions: 19.4
 Active smartphones: 14.1
 Active tablets: 2.8

WORLD RANKING

Physical: 10
 Digital: 12
 Performance rights: 9
 Synchronisation: 18
Total market: 11



RECORDED MUSIC SALES BY SECTOR 2013 (VALUE)



DIGITAL SALES BY FORMAT (VALUE)

RECORDED MUSIC REVENUE (US\$ MILLIONS, TRADE VALUE)

	Physical	Digital	Performance rights	Synchronisation revenue	Total (US\$)	Total (EUR)	Total % change
2013	101.5	72.2	30.7	1.2	205.6	154.2	+0.1%
2012	125.6	46.3	32.2	1.4	205.5	154.1	-6.9%
2011	157.7	28.2	33.9	0.8	220.7	165.5	-15.9%
2010	183.8	21.2	56.4	0.9	262.3	196.7	-2.3%
2009	192.0	16.1	60.3		268.4	201.3	+2.7%

RECORDED MUSIC SALES VOLUME (MILLION UNITS)

	Physical		Digital	
	CD	Other physical	Single tracks	Digital albums
2013	8.8	2.1	9.3	1.6
2012	12.1	2.6	9.9	1.8
2011	16.8	2.9	8.4	1.6
2010	16.7	2.8	5.7	1.2
2009	17.8	3.8	5.5	0.9

TOP SELLING SONGS 2013

	Artist	Title	Company
1	Avicii	Wake me up!	Universal
2	Robin Thicke ft. T.I. + Pharrell	Blurred Lines	Universal
3	Daft Punk ft. Pharrell	Get Lucky	Sony
4	P!nk ft. Nate Ruess	Just Give Me A Reason	Sony
5	Pharrell Williams	Happy	Bertus
6	Stromae	Papaoutai	Universal
7	Armin Van Buuren ft. Trevor Guthrie	This Is What It Feels Like	Armada
8	Mr. Probz	Waves	Mr. Probz
9	Will.I.Am ft. Britney Spears	Scream & Shout	Universal
10	Maaik Ouboter	Dat Ik Je Mis	Rough Trade

TOP INDEPENDENT LABELS (ALPHABETICAL ORDER)

8ball Music
Armada Music
Artist & Company
Challenge Records Int.
Cloud 9 Music
CNR Records
Mascot Provogue
NRGY
Play It Again Sam
Rough Trade
T2
V2 Records

TOP SELLING ALBUMS 2013

	Artist	Title	Company
1	Marco Borsato	Duizend Spiegels	Universal
2	Sandra van Nieuwland	And More	Rough Trade/Tone
3	Caro Emerald	The Shocking Miss Emerald	Rough Trade/Tone
4	Anouk	Sad Singalong Songs	Universal
5	Kinderen Voor Kinderen	Klaar Voor De Start - 34	Rough Trade/Tone
6	Armin van Buuren	Intense	Rough Trade/Tone
7	Racoon	The Singles Collection	PIAS
8	One Direction	Midnight Memories	Sony
9	P!nk	The Truth About Love	Sony
10	Guus Meeuwis	Het kan hier zo mooi zijn	Universal

NORWAY



SOCIAL AND ECONOMIC INDICATORS

Population (millions): 5.1
 Language: Norwegian
 Currency: Norwegian Kroner (NOK)
 US\$ exchange rate: 5.88
 GDP per capita (US\$): 55,400
 GDP % change: +1.6%
 Total music revenues per capita (US\$): 23.5

INDUSTRY INFORMATION

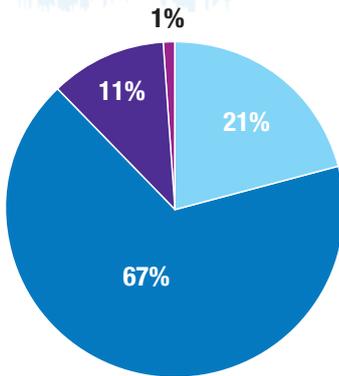
Chart compiler: VG Newspaper / IFPI Norway
 lista.vg.no
 Performance rights music licensing company:
 Gramo / IFPI Norway www.gramo.no
 Local music industry association: IFPI Norway
 www.ifpi.no

DIGITAL INDICATORS IN MILLIONS

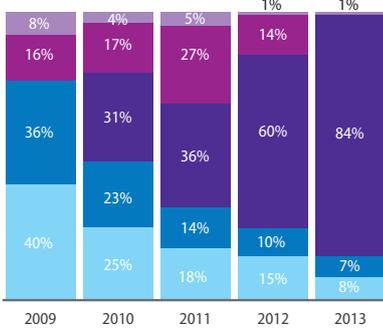
Internet users: 4.7
 Broadband households: 1.9
 Mobile subscriptions: 6.0
 Active smartphones: 3.7
 Active tablets: 0.5

WORLD RANKING

Physical: 27
 Digital: 10
 Performance rights: 17
 Synchronisation: 17
Total market: 15



RECORDED MUSIC SALES BY SECTOR 2013 (VALUE)
 Physical Digital
 Performance rights Synch



DIGITAL SALES BY FORMAT (VALUE)
 Single track Full album
 Subscriptions Ad-supported
 Other

	Physical	Digital	Performance rights	Synchronisation revenue	Total (US\$)	Total (NOK)	Total % change
2013	25.3	80.9	12.6	1.2	120.0	705.5	+2.4%
2012	36.3	67.0	12.9	0.8	117.1	688.6	+6.7%
2011	46.6	49.3	12.5	1.5	109.8	645.6	-0.7%
2010	71.2	27.1	11.3	1.1	110.6	650.3	-6.5%
2009	90.1	17.1	11.1		118.3	695.6	-0.7%

	Physical		Digital	
	CD	Other physical	Single tracks	Digital albums
2013	1.9	0.6	5.8	
2012	2.9	0.3	7.4	
2011	5.9	0.6	7.5	1.2
2010	7.5	0.3	6.6	
2009	8.3	0.4	6.0	

	Artist	Title	Company
1	Avicii	Wake me up!	Virgin/Universal
2	Passenger	Let her Go	Sony
3	Envy	Am I Wrong	Parlophone/Warner
4	Daft Punk ft. Pharrell	Get Lucky	Sony
5	Robin Thicke ft. T.I. + Pharrell	Blurred Lines	Star Trak/Universal
6	DJ Broiler	Vanski	Universal
7	P!nk ft. Nate Ruess	Just Give Me A Reason	Sony
8	Ryan Lewis & Macklemore ft. Ray Dalton	Can't Hold Us	Macklemore/Warner
9	Avicii	Hey Brother	Virgin/Universal
10	Imagine Dragons	Radioactive	Universal

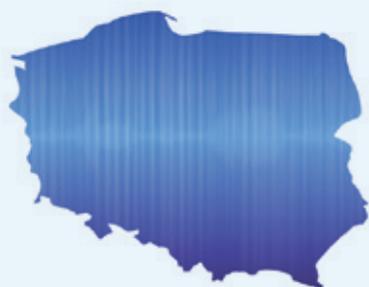
TOP INDEPENDENT LABELS (ALPHABETICAL ORDER)

- Bare Bra Musikk/Tylden
- Cosmos Music Group
- Mudi AS
- Musikkoperatørene AS
- Naxos Norway AS
- Playground
- VME

TOP SELLING ALBUMS 2013

	Artist	Title	Company
1	Various Artists	Hver Gang Vi Møtes 2	Parlophone/Warner
2	Avicii	True	Virgin/Universal
3	Bjørn Eidsvåg	Far Faller	Relis/Sony
4	Kurt Nilsen	Have Yourself A Merry Little Christmas	Playroom/Sony
5	Kurt Nilsen	Inni En God Periode	RCA/Sony
6	One Direction	Midnight Memories	Syco/Sony
7	Daft Punk	Random Access Memories	Columbia/Sony
8	Ingebjørg Bratland & Odd Nordstoga	Heimafrå	Universal
9	P!nk	The Truth About Love	Sony
10	Ole Paus	Avslutningen	Warner

POLAND



SOCIAL AND ECONOMIC INDICATORS

Population (millions): 38.4
 Language: Polish
 Currency: Polish Zloty (PLN)
 US\$ exchange rate: 3.16
 GDP per capita (US\$): 21,100
 GDP % change: +1.3%
 Total music revenues per capita (US\$): 1.8

INDUSTRY INFORMATION

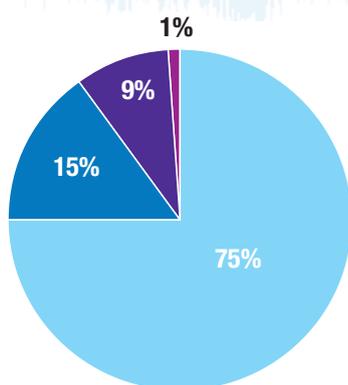
Chart compiler: ZPAV / TNS Polska
www.zpav.pl
 Performance rights music licensing company:
 ZPAV www.zpav.pl
 Local music industry association:
 ZPAV www.zpav.pl

DIGITAL INDICATORS IN MILLIONS

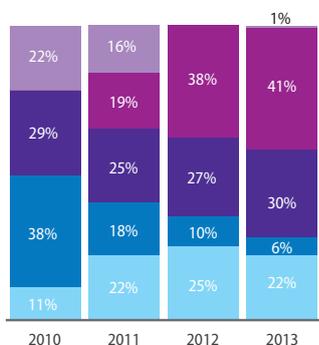
Internet users: 25.6
 Broadband households: 6.7
 Mobile subscriptions: 55.1
 Active smartphones: 14.8
 Active tablets: 2.5

WORLD RANKING

Physical: 18
 Digital: 32
 Performance rights: 26
 Synchronisation: 25
Total market: 24



RECORDED MUSIC SALES BY SECTOR 2013 (VALUE)
 Physical Digital
 Performance rights Synchronisation



DIGITAL SALES BY FORMAT (VALUE)
 Downloads Mobile
 Subscriptions Ad-supported
 Other

RECORDED MUSIC REVENUE (US\$ MILLIONS, TRADE VALUE)

	Physical	Digital	Performance rights	Synchronisation revenue	Total (US\$)	Total (PLN)	Total % change
2013	51.9	10.6	5.9	0.8	69.1	218.4	-11.6%
2012	62.4	7.1	7.2	1.5	78.2	247.1	+2.1%
2011	66.1	4.1	4.9	1.6	76.6	242.0	-6.9%
2010	72.1	2.4	6.1	1.6	82.3	260.0	-0.8%
2009	78.5		4.5		83.0	262.2	-3.0%

RECORDED MUSIC SALES VOLUME (MILLION UNITS)

	Physical	
	CD	Other physical
2013	7.1	0.4
2012	9.1	0.4
2011	7.8	0.5
2010	8.9	0.7
2009	10.2	1.4

TOP SELLING SONGS 2013

	Artist	Title	Company
1	Gotye feat. Kimbra	Somebody That I Used To Know	Universal
2	PSY	Gangnam Style	Universal
3	Rihanna	Diamonds	Universal
4	Rihanna	Stay	Universal
5	Robin Thicke feat. Pharrell & T.I.	Blurred Lines	Universal
6	Rafał Brzozowski	Tak blisko	Universal
7	Ewelina Lisowska	W Stronę Słońca	Universal
8	will.i.am	Scream & Shout	Universal
9	Naughty Boy feat. Sam Smith	La La La	Universal
10	Avicii	Wake Me Up	Universal

TOP INDEPENDENT LABELS (ALPHABETICAL ORDER)

Agora
Dux
Fonografika
Kayax
Metal Mind Production
My Music
MJM
Mystic Production
Polskie Nagrania
Polskie Radio
Sonic
SP Records

TOP SELLING ALBUMS 2013

	Artist	Title	Company
1	Dawid Podsiadło	Comfort and Happiness	Sony
2	Anna German	Złota Kolekcja	Parlophone
3	Various Artists	Violetta - Hoy Somos Más Vol. 2	Universal
4	Sting	The Last Ship	Universal
5	Various Artists	Violetta	Universal
6	One Direction	Midnight Memories	Sony
7	Sylvia Grzeszczak	Komponując Siebie	Parlophone
8	Edyta Bartosiewicz	Renovatio	Parlophone
9	O.S.T.R. & Hades	Haos	Parlophone
10	Jaromír Nohavica	Kometa - The Best Of Nohavica	Universal

PORTUGAL



SOCIAL AND ECONOMIC INDICATORS

Population (millions): 10.8
 Language: Portuguese
 Currency: Euro (EUR)
 US\$ exchange rate: 0.75
 GDP per capita (US\$): 22,900
 GDP % change: -1.8%
 Total music revenues per capita (US\$): 2.6

INDUSTRY INFORMATION

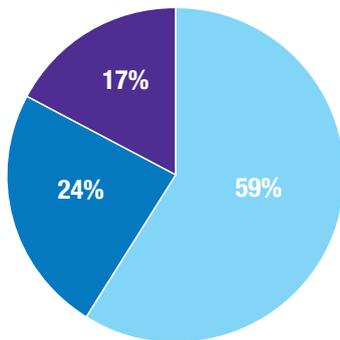
Chart compiler: GfK Portugal www.gfk.pt
 Performance rights music licensing company:
 Audiogest www.passmusica.pt
 Local music industry association: AFP
www.afp.org.pt

DIGITAL INDICATORS IN MILLIONS

Internet users: 7.3
 Broadband households: 2.3
 Mobile subscriptions: 17.2
 Active smartphones: 6.5
 Active tablets: 0.6

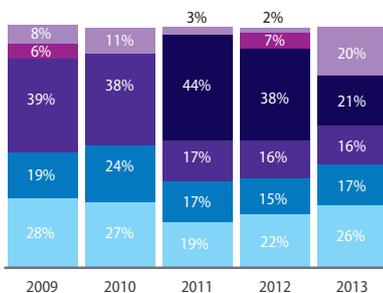
WORLD RANKING

Physical: 33
 Digital: 36
 Performance rights: 29
Total market: 34



RECORDED MUSIC SALES BY SECTOR 2013 (VALUE)

Physical Digital Performance rights



DIGITAL SALES BY FORMAT (VALUE)

Single track Full album Mobile Subscriptions Ad-supported Other

RECORDED MUSIC REVENUE (US\$ MILLIONS, TRADE VALUE)

	Physical	Digital	Performance rights	Synchronisation revenue	Total (US\$)	Total (EUR)	Total % change
2013	16.6	6.9	4.9		28.5	21.4	-6.6%
2012	19.9	6.7	4.0		30.5	22.9	-13.4%
2011	26.0	4.5	4.5	0.3	35.2	26.4	-21.8%
2010	37.4	3.3	4.3		45.0	33.8	-19.1%
2009	48.1	3.8	3.8		55.7	41.8	-12.4%

RECORDED MUSIC SALES VOLUME (MILLION UNITS)

	Physical		Digital	
	CD	Other physical	Single tracks	Digital albums
2013	2.9	0.4	0.6	0.1
2012	3.6	0.4	1.1	0.1
2011	4.7	0.5	0.8	0.1
2010	5.3	0.6	0.4	0.1
2009	6.3	1.1	0.4	0.4

TOP SELLING SONGS 2013

	Artist	Title	Company
1	Daft Punk ft. Pharrell	Get Lucky	Sony
2	P!nk feat. Nate Ruess	Just Give Me A Reason	Sony
3	Avicii	Wake Me Up!	Universal
4	Anselmo Ralph	Não Me Toca	Sony
5	Rihanna	Diamonds	Universal
6	Robin Thicke ft. T.I. + Pharrell	Blurred Lines	Universal
7	James Arthur	Impossible	Sony
8	Imagine Dragons	On Top Of The World	Universal
9	Alicia Keys	Girl On Fire	Sony
10	Passenger	Let Her Go	Sony

TOP INDEPENDENT LABELS (ALPHABETICAL ORDER)

Espacial
Farol Musica
iPlay
Ovação
Vidisco

TOP SELLING ALBUMS 2013

	Artist	Title	Company
1	Tony Carreira	Essencial	Farol
2	Ana Moura	Desfado	Universal
3	Tony Carreira	25 Anos	Farol
4	One Direction	Midnight Memories	Sony
5	One Direction	Take Me Home	Sony
6	Paula Fernandes	Paula Fernandes (Ao Vivo)	Universal
7	Antonio Zambujo	Quinto	Universal
8	Various Artists	Violetta	Universal
9	Pablo Alborán	En Acústico	Warner
10	Pedro Abrunhosa & Comité Caviar	Contramão	Universal

RUSSIA



SOCIAL AND ECONOMIC INDICATORS

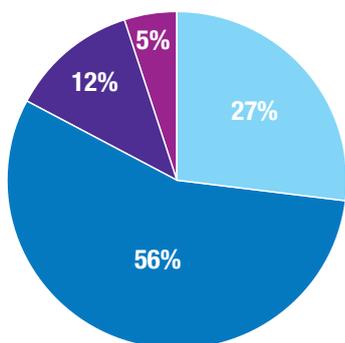
Population (millions): 142.4
 Language: Russian, Dolgang
 Currency: Russian Rouble (RUB)
 US\$ exchange rate: 31.89
 GDP per capita (US\$): 18,100
 GDP % change: +1.3%
 Total music revenues per capita (US\$): 0.5

WORLD RANKING

Physical: 30
 Digital: 20
 Performance rights: 22
 Synchronisation: 10
Total market: 23

DIGITAL INDICATORS IN MILLIONS

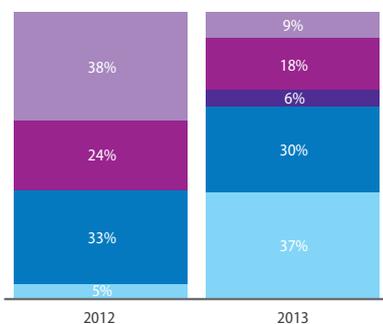
Internet users: 79.9
 Broadband households: 20.7
 Mobile subscriptions: 237.0
 Active smartphones: 62.0



RECORDED MUSIC SALES BY SECTOR 2013 (VALUE)
 Physical Digital Performance rights Synch

RECORDED MUSIC REVENUE (US\$ MILLIONS, TRADE VALUE)							
	Physical	Digital	Performance rights	Synchronisation revenue	Total (US\$)	Total (RUB)	Total % change
2013	19.0	38.7	8.3	3.3	69.4	2,212.3	+12.5%
2012	20.0	32.9	5.1	3.7	61.7	1,966.9	
2011							
2010							
2009							

Note: Complete sales data not available for 2009-2011



DIGITAL SALES BY FORMAT (VALUE)
 Downloads Mobile Subscriptions Ad-supported Other

SLOVAKIA



SOCIAL AND ECONOMIC INDICATORS

Population (millions): 5.5
 Language: Slovak
 Currency: Euro (EUR)
 US\$ exchange rate: 0.75
 GDP per capita (US\$): 24,700
 GDP % change: +0.8%
 Total music revenues per capita (US\$): 1.3

INDUSTRY INFORMATION

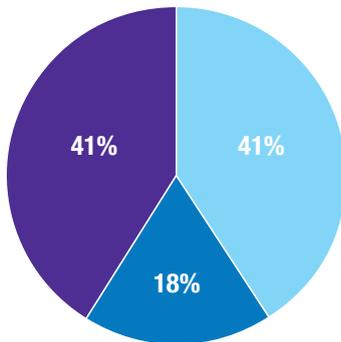
Chart compiler: IFPI Czech Republic www.ifpicr.cz
 Performance rights music licensing company:
 SLOVGRAM www.slovgram.sk
 Local music industry association:
 IFPI Czech Republic www.ifpicr.cz

DIGITAL INDICATORS IN MILLIONS

Internet users: 4.5
 Broadband households: 1.0
 Mobile subscriptions: 6.5
 Active smartphones: 2.6
 Active tablets: 0.3

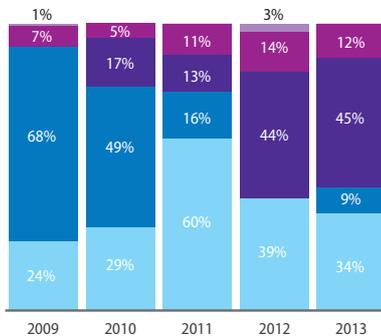
WORLD RANKING

Physical: 46
 Digital: 45
 Performance rights: 35
Total market: 47



RECORDED MUSIC SALES BY SECTOR 2013 [VALUE]

Physical Digital Performance rights



DIGITAL SALES BY FORMAT [VALUE]

Downloads Mobile Subscriptions Ad-supported Other

RECORDED MUSIC REVENUE (US\$ MILLIONS, TRADE VALUE)

	Physical	Digital	Performance rights	Synchronisation revenue	Total (US\$)	Total (EUR)	Total % change
2013	2.9	1.3	2.9		7.1	5.3	-0.1%
2012	3.4	0.8	2.8	0.1	7.1	5.3	-7.0%
2011	3.9	0.3	3.3	0.1	7.6	5.7	-14.3%
2010	6.0	0.2	2.6	0.1	8.9	6.6	+40.5%
2009	6.0	0.4			6.3	4.7	-27.7%

RECORDED MUSIC SALES VOLUME (MILLION UNITS)

	Physical	
	CD	Other physical
2013	0.4	
2012	0.4	
2011	0.6	0.1
2010	1.3	0.1
2009	1.4	0.1

TOP SELLING ALBUMS 2013

	Artist	Title	Company
1	Kontrafakt	Navždy	Universal Music
2	Müller Richard	Hlasy	Universal Music
3	Kysucký Prameň	Dobry Večer Frajarečka Moja	Česká Muzika
4	Veselá Trojka	Už Nám Kamarádi	Česká Muzika
5	Duo Yamaha	Elixír Mladosti A Veselica	Česká Muzika
6	Svoboda Karel	Největší Hity	Supraphon
7	Veselá Trojka	Parta Veselá	Česká Muzika
8	Müller Richard	Všetko	Universal Music
9	Kysucký Prameň	Cez Kysuce	Česká Muzika
10	Hegerová Hana	Zlatá Kolekce 1957-2010	Supraphon

TOP INDEPENDENT LABELS [ALPHABETICAL ORDER]

East West Promotion
 Forza
 Inflagranti Records
 Opus
 Street Production
 Supraphon

SPAIN



SOCIAL AND ECONOMIC INDICATORS

Population (millions): 47.4
 Language: Spanish
 Currency: Euro (EUR)
 US\$ exchange rate: 0.75
 GDP per capita (US\$): 30,100
 GDP % change: -1.3%
 Total music revenues per capita (US\$): 3.2

INDUSTRY INFORMATION

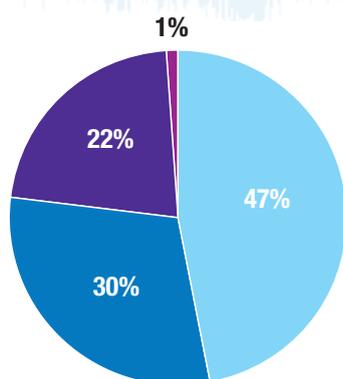
Chart compiler: GfK Media Control/BMAT
www.gfk.com / www.bmat.com
 Performance rights music licensing company:
 AGEDI www.agedi.es
 Local music industry association: PROMUSICAE
www.promusicae.es

DIGITAL INDICATORS IN MILLIONS

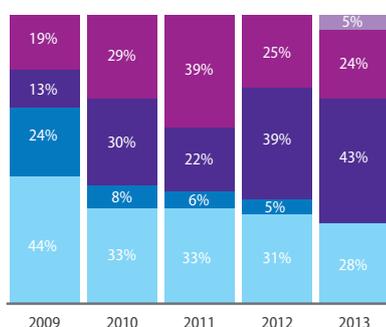
Internet users: 35.7
 Broadband households: 9.5
 Mobile subscriptions: 49.8
 Active smartphones: 29.3
 Active tablets: 3.2

WORLD RANKING

Physical: 13
 Digital: 18
 Performance rights: 7
 Synchronisation: 14
Total market: 13



RECORDED MUSIC SALES BY SECTOR 2013 (VALUE)
 Physical Digital
 Performance rights Synch



DIGITAL SALES BY FORMAT (VALUE)
 Downloads Mobile
 Subscriptions Ad-supported
 Other

RECORDED MUSIC REVENUE (US\$ MILLIONS, TRADE VALUE)

	Physical	Digital	Performance rights	Synchronisation revenue	Total (US\$)	Total (EUR)	Total % change
2013	71.6	44.8	32.7	1.7	150.7	113.0	-12.4%
2012	92.7	45.0	32.3	2.1	172.1	129.0	-3.8%
2011	101.7	40.7	34.7	1.6	178.8	134.1	-4.2%
2010	122.1	34.6	27.8	2.2	186.7	140.0	-20.3%
2009	170.9	28.8	34.6		234.2	175.7	-14.1%

RECORDED MUSIC SALES VOLUME (MILLION UNITS)

	Physical		Digital
	CD	Other physical	Single tracks
2013	7.0	0.6	7.5
2012	8.6	0.7	8.5
2011	8.8	0.8	6.3
2010	10.5	1.5	5.9
2009	15.2	4.2	6.4

TOP SELLING SONGS 2013

	Artist	Title	Company
1	Dani Martin	Cero	Sony
2	Daft Punk ft. Pharrell	Get Lucky	Sony
3	Yandar & Yostin ft. Andy Riviera	Te Pintaron Pajaritos	We Love Asere!/Sony
4	Robin Thicke ft. T.I. + Pharrell	Blurred Lines	Universal
5	Avicii	Wake Me Up!	Universal
6	Passenger	Let Her Go	Sony
7	Psy	Gangnam Style	Universal
8	Cali & El Dandee	No Digas Nada	Universal
9	Will.I.Am ft. Britney Spears	Scream & Shout	Universal
10	James Arthur	Impossible	Sony

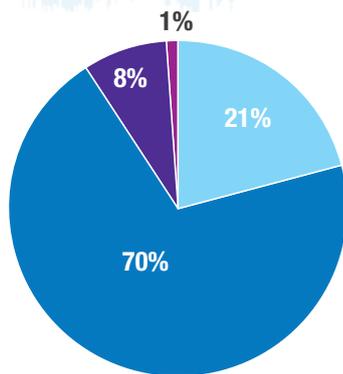
TOP INDEPENDENT LABELS (ALPHABETICAL ORDER)

Avispa
 Blanco Y Negro
 Discmedi
 Divucsa
 Naïve
 Open Records
 Roster Music

TOP SELLING ALBUMS 2013

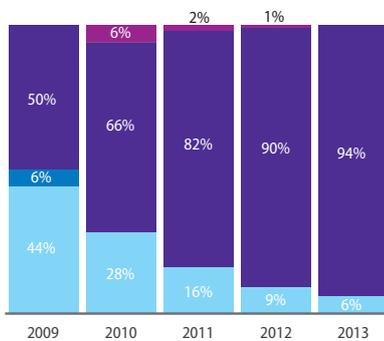
	Artist	Title	Company
1	Pablo Alborán	Tanto	Parlophone
2	Various Artists	Violetta - La Música Es Mi Mundo	Universal
3	Alejandro Sanz	La Música No Se Toca	Universal
4	Melendi	Lágrimas Desordenadas	Warner Dro
5	Dani Martin	Dani Martin	Sony
6	One Direction	Midnight Memories	Sony
7	Various Artists	Violetta	Universal
8	Various Artists	Violetta - Hoy Somos Más	Universal
9	Malú	Si	Sony
10	Pablo Alborán	En Acústico	Parlophone

SWEDEN



RECORDED MUSIC SALES BY SECTOR 2013 (VALUE)

Physical Digital Performance rights Synchronisation



DIGITAL SALES BY FORMAT (VALUE)

Downloads Mobile Subscriptions Other

SOCIAL AND ECONOMIC INDICATORS

Population (millions): 9.6
 Language: Swedish
 Currency: Sweden Krona (SEK)
 US\$ exchange rate: 6.52
 GDP per capita (US\$): 40,900
 GDP % change: +0.9%
 Total music revenues per capita (US\$): 20.2

INDUSTRY INFORMATION

Chart compiler:
 GLF / IFPI Sweden www.sverigetopplistan.se
 Performance rights music licensing company:
 IFPI Sweden www.ifpi.se
 Local music industry association:
 IFPI Sweden www.ifpi.se

DIGITAL INDICATORS IN MILLIONS

Internet users: 9.1
 Broadband households: 2.9
 Mobile subscriptions: 14.6
 Active smartphones: 6.3
 Active tablets: 1.3

WORLD RANKING

Physical: 20
 Digital: 8
 Performance rights: 13
 Synchronisation: 12
Total market: 12

RECORDED MUSIC REVENUE (US\$ MILLIONS, TRADE VALUE)

	Physical	Digital	Performance rights	Synchronisation revenue	Total (US\$)	Total (SEK)	Total % change
2013	41.1	135.3	15.8	1.9	194.2	1,266.2	+5.7%
2012	58.8	108.0	14.6	2.3	183.7	1,197.7	+18.7%
2011	69.0	68.5	15.4	1.9	154.8	1,009.4	+3.0%
2010	91.7	41.5	14.7	2.4	150.3	979.7	-7.2%
2009	122.9	23.9	15.2		162.0	1,056.0	+11.9%

RECORDED MUSIC SALES VOLUME (MILLION UNITS)

	Physical		Digital	
	CD	Other physical	Single tracks	Digital albums
2013	4.2	0.4	3.1	1.0
2012	5.9	0.4	7.4	0.5
2011	7.8	0.4	4.3	0.5
2010	13.7	0.6	4.4	0.5
2009	13.6	1.0	5.2	0.4

TOP SELLING SONGS 2013

	Artist	Title	Company
1	Avicii	Wake Me Up!	Avicii Music AB
2	Passenger	Let Her Go	Embassy Of Music
3	Macklemore & Ryan Lewis ft. Wanz	Thrift Shop	Ada US
4	Macklemore & Ryan Lewis ft. Ray Dalton	Can't Hold Us	Macklemore
5	Aki ft. Kapten Röd	När Solen Går Ner	Universal
6	Zara Larsson	Uncover	Record Company Ten
7	Avicii vs. Nicky Romero	I Could Be The One	Universal
8	Avicii	Hey Brother	Avicii Music AB
9	Robin Stjernberg	You	Universal
10	Will.I.Am ft. Britney Spears	Scream & Shout	Interscope

TOP INDEPENDENT LABELS (ALPHABETICAL ORDER)

Cosmos Music Group
 Family Tree Music
 Playground Music Scandinavia
 Roxy Recordings
 Sound Pollution Recordings

TOP SELLING ALBUMS 2013

	Artist	Title	Company
1	Gyllene Tider	Dags Att Tänka På Refrängen	Parlophone
2	Avicii	True	Universal
3	Mando Diao	Infruset Guld	Musica De La Santa
4	Sanna Nielsen	Min Jul	Parlophone
5	Veronica Maggio	Handen I Fickan Fast Jag Bryr Mig	Universal
6	Håkan Hellström	Det Kommer Aldrig Va Över För Mig	Stranded Rekords
7	Lars Winnerbäck	Hosianna	Universal
8	Lasse Stefanz	Trouble Boys	Mariann
9	Yohio	Break The Border - Platinum Edition	Ninetone/Universal
10	One Direction	Midnight Memories	Syco

SWITZERLAND



SOCIAL AND ECONOMIC INDICATORS

Population (millions): 8.0
 Language: German, French, Italian
 Currency: Swiss Franc (CHF)
 US\$ exchange rate: 0.93
 GDP per capita (US\$): 46,000
 GDP % change: +1.7%
 Total music revenues per capita (US\$): 14.5

INDUSTRY INFORMATION

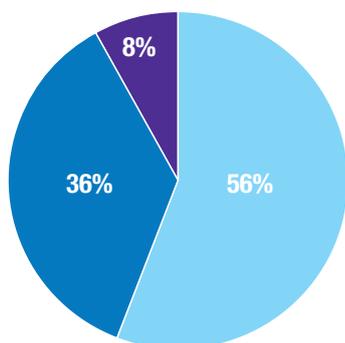
Chart compiler: Media Control GfK
www.hitparade.ch / www.media-control.de
 Performance rights music licensing company:
 Swissperform / IFPI Switzerland www.swissperform.ch
 Local music industry association:
 IFPI Schweiz www.ifpi.ch

DIGITAL INDICATORS IN MILLIONS

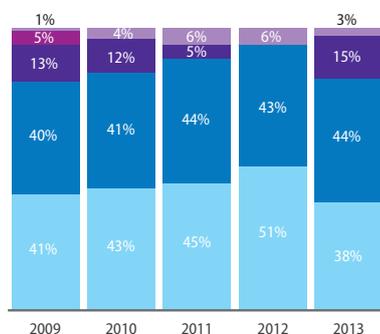
Internet users: 7.0
 Broadband households: 2.9
 Mobile subscriptions: 10.6
 Active smartphones: 6.2
 Active tablets: 1.1

WORLD RANKING

Physical: 15
 Digital: 19
 Performance rights: 21
 Synchronisation: 29
Total market: 17



RECORDED MUSIC SALES BY SECTOR 2013 (VALUE)
 ■ Physical ■ Digital ■ Performance rights



DIGITAL SALES BY FORMAT (VALUE)
 ■ Single track ■ Full album ■ Subscriptions ■ Mobile ■ Other

RECORDED MUSIC REVENUE (US\$ MILLIONS, TRADE VALUE)

	Physical	Digital	Performance rights	Synchronisation revenue	Total (US\$)	Total (CHF)	Total % change
2013	64.2	42.2	8.9	0.4	115.6	107.5	-10.9%
2012	79.1	41.4	8.6	0.7	129.8	120.7	-14.3%
2011	109.5	33.8	8.0	0.2	151.5	140.9	-16.2%
2010	143.7	28.5	8.5	0.1	180.8	168.2	-13.0%
2009	174.3	25.2	8.3		207.8	193.2	-7.1%

RECORDED MUSIC SALES VOLUME (MILLION UNITS)

	Physical		Digital	
	CD	Other physical	Single tracks	Digital albums
2013	4.3	0.3		
2012	5.1	1.0	25.7	1.9
2011	7.3	0.5	14.0	1.5
2010	8.4	0.6	12.3	1.9
2009	9.8	0.8	10.0	1.2

TOP SELLING SONGS 2013

	Artist	Title	Company
1	Avicii	Wake Me Up!	Universal
2	Robin Thicke ft. T.I. + Pharrell	Blurred Lines	Universal
3	Daft Punk ft. Pharrell	Get Lucky	Universal
4	Passenger	Let Her Go	Sony
5	Macklemore & Ryan Lewis ft. Wanz	Thrift Shop	Warner
6	Will.I.Am ft. Britney Spears	Scream & Shout	Universal
7	James Arthur	Impossible	Sony
8	P!nk ft. Nate Ruess	Just Give Me A Reason	Sony
9	Macklemore & Ryan Lewis ft. Ray Dalton	Can't Hold Us	Warner
10	Klangkarussell	Sonnentanz	Universal

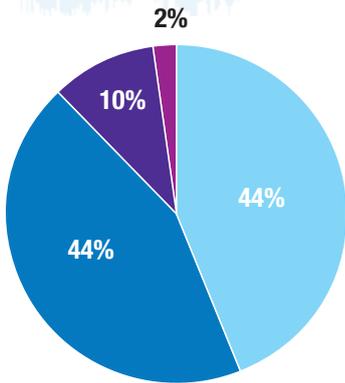
TOP INDEPENDENT LABELS (ALPHABETICAL ORDER)

Harmonia mundi- Musicora AG
 K-Tel International AG
 Musikvertrieb AG
 Phonag Records AG
 TBA AG

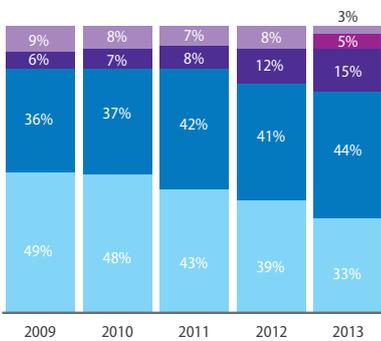
TOP SELLING ALBUMS 2013

	Artist	Title	Company
1	Beatrice Egli	Glücksgefühle	Universal
2	Daft Punk	Random Access Memories	Sony
3	DJ Antoine	2013 - Sky Is The Limit	Phonag
4	P!nk	The Truth About Love	Sony
5	Stromae	Racine Carrée	Universal
6	Helene Fischer	Farbenspiel	Universal
7	Bligg	Service Publigg	Universal
8	Bruno Mars	Unorthodox Jukebox	Warner
9	Zaz	Recto Verso	Sony
10	Passenger	All The Little Lights	Warner

UNITED KINGDOM



RECORDED MUSIC SALES BY SECTOR 2013 (VALUE)



DIGITAL SALES BY FORMAT (VALUE)

SOCIAL AND ECONOMIC INDICATORS

Population (millions): 63.4
 Language: English
 Currency: British Pound (GBP)
 US\$ exchange rate: 0.64
 GDP per capita (US\$): 37,300
 GDP % change: +1.4%
 Total music revenues per capita (US\$): 20.6

INDUSTRY INFORMATION

Chart compiler:
 Official Charts Company / Millward Brown
www.theofficialcharts.com
 Performance rights music licensing company:
 PPL www.ppluk.com
 Local music industry association:
 BPI www.bpi.co.uk

DIGITAL INDICATORS IN MILLIONS

Internet users: 55.9
 Broadband households: 21.0
 Mobile subscriptions: 84.5
 Active smartphones: 53.2
 Active tablets: 19.0

WORLD RANKING

Physical: 5
 Digital: 2
 Performance rights: 2
 Synchronisation: 2
Total market: 4

RECORDED MUSIC REVENUE (US\$ MILLIONS, TRADE VALUE)

	Physical	Digital	Performance rights	Synchronisation revenue	Total (US\$)	Total (GBP)	Total % change
2013	570.9	570.5	133.4	28.7	1,303.5	834.2	+2.2%
2012	610.0	510.0	126.4	28.4	1,274.8	815.9	-6.9%
2011	788.8	434.3	112.2	33.9	1,369.2	876.3	-4.3%
2010	934.4	350.3	112.8	33.8	1,431.3	916.0	-9.0%
2009	1,156.3	294.4	122.5		1,573.2	1,006.8	+1.9%

RECORDED MUSIC SALES VOLUME (MILLION UNITS)

	Physical		Digital	
	CD	Other physical	Single tracks	Digital albums
2013	61.5	5.4	175.6	32.6
2012	66.5	5.2	183.3	30.5
2011	94.0	4.9	175.1	26.6
2010	99.8	6.3	158.6	21.0
2009	119.4	9.5	148.8	16.1

TOP SELLING SONGS 2013

	Artist	Title	Company
1	Robin Thicke ft. T.I. + Pharrell	Blurred Lines	Polydor
2	Daft Punk ft. Pharrell	Get Lucky	Columbia
3	Avicii	Wake Me Up!	Virgin EMI
4	Passenger	Let Her Go	Nettwerk
5	Naughty Boy ft. Sam Smith	La La La	Virgin EMI
6	Katy Perry	Roar	Virgin EMI
7	Macklemore & Ryan Lewis ft. Wanz	Thrift Shop	Macklemore
8	P!nk ft. Nate Ruess	Just Give Me A Reason	RCA
9	OneRepublic	Counting Stars	Polydor
10	Justin Timberlake	Mirrors	RCA

Source: Official Charts Company.

TOP INDEPENDENT LABELS (ALPHABETICAL ORDER)

Delta
Demon Music Group
Domino Recordings
Dramatico
Go Entertain
Ministry Of Sound Group
Nettwerk
Not Now Music
PIAS
Union Square Music
XL Beggars

TOP SELLING ALBUMS 2013

	Artist	Title	Company
1	Various Artists	Now That's What I Call Music 86	Sony/ Virgin EMI
2	Various Artists	Now That's What I Call Music 85	Sony/ Virgin EMI
3	Various Artists	Now That's What I Call Music 84	Sony/ Virgin EMI
4	One Direction	Midnight Memories	RCA
5	Emeli Sandé	Our Version Of Events	Virgin EMI
6	Michael Bublé	To Be Loved	Warner
7	Robbie Williams	Swings Both Ways	Island
8	Olly Murs	Right Place Right Time	Epic
9	Bruno Mars	Unorthodox Jukebox	Atlantic
10	Rod Stewart	Time	Decca

Source: Official Charts Company.

CHINA



SOCIAL AND ECONOMIC INDICATORS

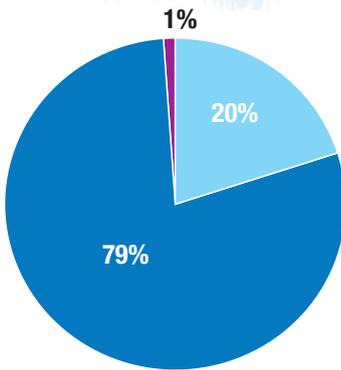
Population (millions): 1,355.7
 Language: Standard Chinese, Mandarin
 Currency: Chinese Yuan (CNY)
 US\$ exchange rate: 6.20
 GDP per capita (US\$): 9,800
 GDP % change: +7.6%
 Total music revenues per capita (US\$): 0.1

WORLD RANKING

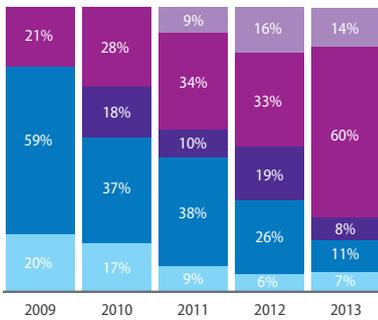
Physical: 35
 Digital: 14
 Synchronisation: 26
Total market: 21

DIGITAL INDICATORS IN MILLIONS

Internet users: 627.0
 Broadband households: 172.6
 Mobile subscriptions: 1,243.2
 Active smartphones: 517.9
 Active tablets: 57.8



RECORDED MUSIC SALES BY SECTOR 2013 (VALUE)
 Physical Digital Synch



DIGITAL SALES BY FORMAT (VALUE)
 Downloads Mobile Subscriptions Ad-supported Other

	Physical	Digital	Performance rights	Synchronisation revenue	Total (US\$)	Total (CNY)	Total % change
2013	16.6	65.4		0.6	82.6	512.3	-12.4%
2012	17.2	76.3		0.8	94.3	584.8	+22.7%
2011	20.8	56.1			76.9	476.7	-1.2%
2010	18.8	59.0			77.8	482.4	-1.6%
2009	21.2	57.9			79.1	490.3	-7.4%

	Physical	
	CD	Other physical
2013	3.6	0.2
2012	4.0	0.1
2011	4.3	0.2
2010	4.3	0.1
2009	4.2	0.8

TOP INDEPENDENT LABELS (ALPHABETICAL ORDER)

- China Record Corp.
- EE-Media
- H.Brother Music
- Rhymoi Music
- Shanghai Synergy

HONG KONG



SOCIAL AND ECONOMIC INDICATORS

Population (millions):	7.1
Language:	Cantonese, English
Currency:	Hong Kong Dollar (HKD)
US\$ exchange rate:	7.76
GDP per capita (US\$):	52,700
GDP % change:	+3.0%
Total music revenues per capita (US\$):	5.5

INDUSTRY INFORMATION

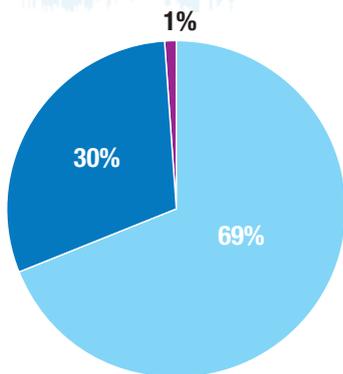
Performance rights music licensing company: HKRIA and PP(SEA)L www.ppseal.com www.hkria.com
 Local music industry association: Hong Kong Recording Industry Alliance (HKRIA) / IFPI (Hong Kong Group) Ltd www.hkria.com / www.ifpihk.org

DIGITAL INDICATORS IN MILLIONS

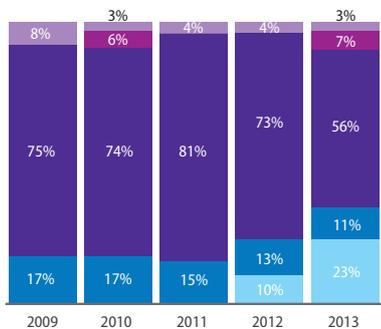
Internet users:	5.3
Broadband households:	2.1
Mobile subscriptions:	15.1
Active smartphones:	6.4
Active tablets:	2.1

WORLD RANKING

Physical:	26
Digital:	30
Synchronisation:	28
Total market:	32



RECORDED MUSIC SALES BY SECTOR 2013 (VALUE)
 Physical Digital Synch



DIGITAL SALES BY FORMAT (VALUE)
 Downloads Mobile Subscriptions Ad-supported Other

	Physical	Digital	Synchronisation revenue	Total (US\$)	Total (HKD)	Total % change
2013	26.8	11.5	0.4	38.7	300.0	-1.9%
2012	28.7	10.2	0.5	39.4	305.7	-0.8%
2011	31.1	8.2	0.4	39.7	308.2	+0.7%
2010	31.6	7.6	0.3	39.4	306.0	-9.0%
2009	35.5	7.8	0.0	43.3	336.3	-11.9%

	Physical	
	CD	Other physical
2013	1.6	0.3
2012	1.9	0.3
2011	2.1	0.4
2010	2.3	0.4
2009	2.7	0.5

TOP INDEPENDENT LABELS (ALPHABETICAL ORDER)

- Beggars Group Media Ltd. (international)
- bma Records Ltd.
- EAS Music Ltd.
- East Asia Music (Holdings) Ltd.
- Emperor Entertainment (Hong Kong) Ltd.
- Evolution Limited
- Forward Music Co. Ltd.
- Gold Typhoon Entertainment Ltd.
- HNH International Ltd. (Naxos)
- Hummingbird Music Limited
- Love Da Group Co. Ltd.
- Neway Star Ltd.
- Soundgood Production Ltd.
- Starz Track Ltd.
- Sun Entertainment Music Limited
- Worldstar Music International Ltd.
- WOW Music Ltd.

INDIA



SOCIAL AND ECONOMIC INDICATORS

Population (millions): 1,220.8
 Language: Hindi
 Currency: Indian Rupee (INR)
 US\$ exchange rate: 58.59
 GDP per capita (US\$): 4,000
 GDP % change: +3.8%
 Total music revenues per capita (US\$): 0.1

INDUSTRY INFORMATION

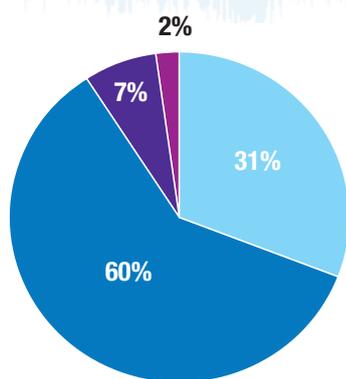
Performance rights music licensing company:
 PPL www.pplindia.org
 Local music industry association:
 IMI www.indianmi.org

DIGITAL INDICATORS IN MILLIONS

Internet users: 222.2
 Broadband households: 14.8
 Mobile subscriptions: 871.7
 Active smartphones: 73.4
 Active tablets: 3.5

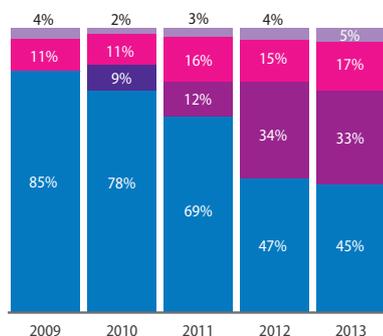
WORLD RANKING

Physical: 24
 Digital: 13
 Performance rights: 23
 Synchronisation: 11
Total market: 19



RECORDED MUSIC SALES BY SECTOR 2013 (VALUE)

Physical Digital
 Performance rights Synch



DIGITAL SALES BY FORMAT (VALUE)

Mobile Downloads
 Subscriptions
 Ad-supported Other

RECORDED MUSIC REVENUE (US\$ MILLIONS, TRADE VALUE)

	Physical	Digital	Performance rights	Synchronisation revenue	Total (US\$)	Total (INR)	Total % change
2013	35.2	67.4	8.1	2.5	113.3	6,637.0	-15.9%
2012	41.7	81.1	9.5	2.3	134.6	7,888.5	+22.1%
2011	46.8	52.6	8.9	1.9	110.3	6,459.6	+6.9%
2010	50.8	41.6	9.1	1.6	103.1	6,042.7	+13.0%
2009	53.5	33.0	4.7		91.2	5,345.9	-3.7%

RECORDED MUSIC SALES VOLUME (MILLION UNITS)

	Physical	
	CD	Other physical
2013	35.5	0.5
2012	41.6	0.8
2011	34.5	1.5
2010	35.5	4.2
2009	33.4	24.7

TOP INDEPENDENT LABELS (ALPHABETICAL ORDER)

Aditya Music (India) Pvt. Ltd.
 Saregama India Limited
 Simran Music Industry
 Super Cassettes Industries
 Times Music
 Tips Industries Ltd.
 Venus Worldwide Entertainment Pvt. Ltd.
 Yashraj Music

INDONESIA



SOCIAL AND ECONOMIC INDICATORS

Population (millions): 251.2
 Language: Bahasa Indonesia
 Currency: Indonesian Rupiah (IDR)
 US\$ exchange rate: 10,469.71
 GDP per capita (US\$): 5,200
 GDP % change: +5.3%
 Total music revenues per capita (US\$): 0.1

INDUSTRY INFORMATION

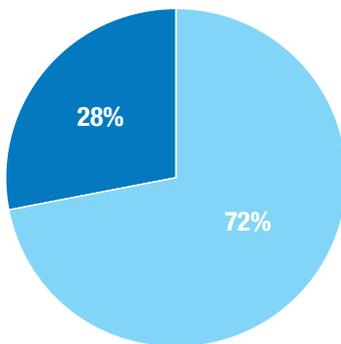
Performance rights music licensing company:
 ASIRINDO
 Local music industry association:
 ASIRI www.asiri.or.id

DIGITAL INDICATORS IN MILLIONS

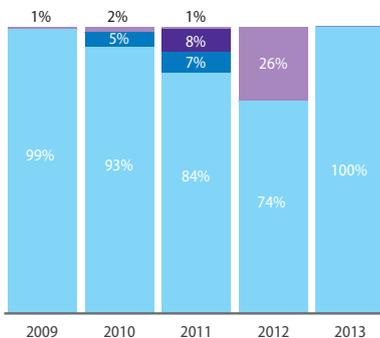
Internet users: 46.5
 Broadband households: 3.5
 Mobile subscriptions: 304.4
 Active smartphones: 73.4
 Active tablets: 2.6

WORLD RANKING

Physical: 31
 Digital: 35
Total market: 35



RECORDED MUSIC SALES BY SECTOR 2013 (VALUE)



DIGITAL SALES BY FORMAT (VALUE)

RECORDED MUSIC REVENUE (US\$ MILLIONS, TRADE VALUE)							
	Physical	Digital	Performance rights	Synchronisation revenue	Total (US\$)	Total (IDR)	Total % change
2013	18.6	7.1			25.7	269,497.2	-11.2%
2012	25.6	3.3			29.0	303,337.0	-39.6%
2011	27.4	20.5			48.0	502,428.0	+5.9%
2010	19.1	26.2			45.3	474,656.2	-11.1%
2009	23.4	27.6			51.0	534,080.7	+5.6%

RECORDED MUSIC SALES VOLUME (MILLION UNITS)

	Physical	
	CD	Other physical
2013	9.3	2.8
2012	13.0	2.9
2011	11.2	4.1
2010	6.3	5.1
2009	7.6	6.3

TOP SELLING SONGS 2013

	Artist	Title	Company
1	Tegar	Dulu Bukan Yang Sekarang Reff 1	Indi_label
2	Gamma1	7 Samudera	Prosound
3	Zivilia	Aishiteru 3	Nagaswara
4	Noah	Hidup Untukmu, Mati Tanpamu	Musica
5	Fatin Shidqia	Aku Memilih Setia	Sony BMG
6	Seventeen	Sumpah Ku Mencintaimu	GP Records
7	Lynda Moymoy	Bang Jali _reff	Sani Sentosa Abadi
8	Noah	Separuh Aku	Musica
9	Geisha	Lumpuhkan Ingatanku	Musica
10	Noah	Sendiri Lagi	Musica

TOP INDEPENDENT LABELS (ALPHABETICAL ORDER)

Aquarius Musikindo
 Musica Studio's
 Nagaswara
 Trinity Optima Production

TOP SELLING ALBUMS 2013

	Artist	Title	Company
1	Michael Bubl�	To Be Loved	Warner
2	Maroon 5	Overexposed (Deluxe Revised)	Universal
3	Angela	Sings Michael Learns To Rock	Inova
4	Pink	The Truth About Love	Sony
5	JKT 48 (CD+DVD)	River	Impac Makmur
6	V.A (3CD)	Love Stories	Warner
7	Bruno Mars	Unorthodox Jukebox	Warner
8	Sabrina	I Love Acoustic 5	Universal
9	Raisa (12-12)	Raisa (Serba Salah)	Universal
10	V.A	Acoustic (2CD)	Warner

JAPAN



SOCIAL AND ECONOMIC INDICATORS

Population (millions): 127.3
 Language: Japanese
 Currency: Japanese Yen (JPY)
 US\$ exchange 97.61
 GDP per capita (US\$): 37,100
 GDP % change: +2.0%
 Total music revenues per capita (US\$): 23.7

INDUSTRY INFORMATION

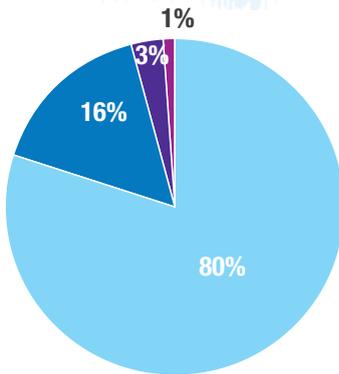
Performance rights music licensing company:
 RIAJ www.riaj.or.jp
 Local music industry association:
 RIAJ www.riaj.or.jp

DIGITAL INDICATORS IN MILLIONS

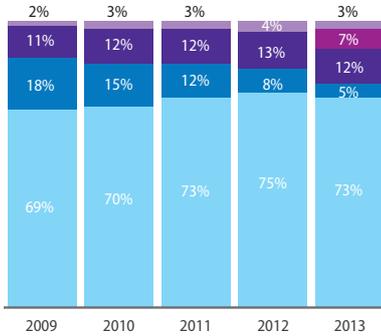
Internet users: 101.9
 Broadband households: 36.3
 Mobile subscriptions: 145.5
 Active smartphones: 84.6
 Active tablets: 12.8

WORLD RANKING

Physical: 1
 Digital: 3
 Performance rights: 4
 Synchronisation: 3
Total market: 2



RECORDED MUSIC SALES BY SECTOR 2013 (VALUE)
 Physical Digital
 Performance rights Synchronisation



DIGITAL SALES BY FORMAT (VALUE)
 Downloads Master ringtones
 Ringback tunes Subscription
 Other

	Physical	Digital	Performance rights	Synchronisation revenue	Total (US\$)	Total (JPY)	Total % change
2013	2,422.5	474.2	89.9	25.4	3,012.0	293,998.2	-16.7%
2012	2,883.7	618.1	85.6	28.7	3,616.1	352,967.8	+4.0%
2011	2,548.3	819.1	83.4	26.5	3,477.3	339,415.5	-5.7%
2010	2,596.1	978.8	84.9	27.0	3,686.8	359,867.6	-7.5%
2009	2,868.6	1,035.7	83.4		3,987.6	389,233.8	-10.4%

	Physical		Digital	
	CD	Other physical	Single tracks	Digital albums
2013	148.6	18.4	133.6	7.3
2012	167.9	20.9	150.1	5.1
2011	156.7	19.3	182.0	3.8
2010	158.6	18.2	202.8	3.1
2009	168.6	20.6	206.0	2.8

Note: Physical CD include singles. Single tracks include mobile downloads.

TOP INDEPENDENT LABELS (ALPHABETICAL ORDER)

- Avex Marketing Inc.
- Being Inc.
- Dreamusic Inc.
- Forlife Music Entertainment Inc.
- King Record Co. Ltd.
- Nippon Columbia Co. Ltd.
- Nippon Crown Co. Ltd.
- Pony Canyon Inc.
- Teichiku Entertainment Inc.
- Tokuma Japan Communications Co. Ltd.
- VAP Inc.
- Victor Entertainment Inc.
- Yamaha Music Communications Co.
- Yoshimoto R and C Co. Ltd.

MALAYSIA



SOCIAL AND ECONOMIC INDICATORS

Population (millions):	29.6
Language:	Bahasa Malaysia
Currency:	Malaysian Ringgit (MYR)
US\$ exchange rate:	3.16
GDP per capita (US\$):	17,500
GDP % change:	+4.7%
Total music revenues per capita (US\$):	1.2

INDUSTRY INFORMATION

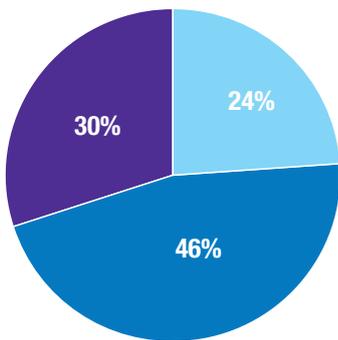
Performance rights music licensing company:	PPM www.ppm.org.my
Local music industry association:	RIM www.rim.org.my

DIGITAL INDICATORS IN MILLIONS

Internet users:	20.2
Broadband households:	2.2
Mobile subscriptions:	40.8
Active smartphones:	12.5

WORLD RANKING

Physical:	38
Digital:	28
Performance rights:	18
Synchronisation:	38
Total market:	33

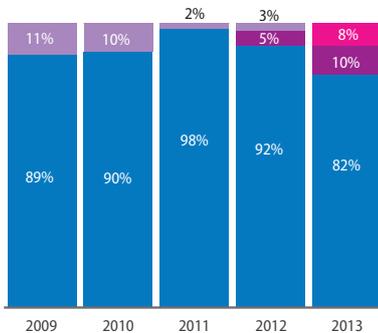


RECORDED MUSIC SALES BY SECTOR 2013 (VALUE)

	Physical	Digital	Performance rights	Synchronisation revenue	Total (US\$)	Total (MYR)	Total % change
2013	8.5	16.3	10.5	0.1	35.5	112.0	-1.8%
2012	12.5	14.4	9.2	0.1	36.1	114.1	+2.1%
2011	14.2	13.2	8.0		35.4	111.8	-5.1%
2010	18.2	12.9	6.1		37.3	117.8	-0.6%
2009	22.7	9.5	5.3		37.5	118.5	+25.3%

RECORDED MUSIC SALES VOLUME (MILLION UNITS)

	Physical	
	CD	Other physical
2013	0.9	0.2
2012	1.4	0.3
2011	1.7	0.5
2010	2.1	0.6
2009	2.5	0.7



DIGITAL SALES BY FORMAT (VALUE)

TOP SELLING ALBUMS 2013

	Artist	Title	Company
1	Various Artists	Malaysia #1 Hits 6	Sony
2	Hafiz Hamidun	Zikir Terapi Diri- Irama Terapi	Warner/Arteffects
3	Maya Karin	Kempen Balik Kampung & Hari Raya (Single)	Warner
4	One Direction	Midnight Memories	Sony/Syco
5	Justin Timberlake	The 20/20 Experience	Sony/ RCA
6	Al Habib Syeikh Bin Abd Qadir As Sagaf	Ya Hanana	Warner/Inteam
7	Michael Bublé	To Be Loved (Deluxe)	Warner/Reprise
8	David Bowie	The Next Day (Deluxe)	Sony/Columbia
9	Hafiz Hamidun	Zikir Terapi Diri II	Warner/Arteffects
10	Il Divo	The Greatest Hits	Sony/Syco

TOP INDEPENDENT LABELS (ALPHABETICAL ORDER)

- Hup Hup Sdn Bhd (Life Records)
- Indigital Sdn Bhd
- Insictech Musicland Sdn Bhd
- Inteam Records Sdn Bhd
- KRU Music Sdn Bhd
- Measat Broadcast Network Systems Sdn Bhd (Previously known as Astro Entertainment Sdn Bhd)
- New Southern Records Sdn Bhd
- Nova Music (M) Sdn Bhd
- Soundlife Records (M) Sdn Bhd
- Suria Records Sdn Bhd

PHILIPPINES



SOCIAL AND ECONOMIC INDICATORS

Population (millions):	105.7
Language:	Filipino, English
Currency:	Philippine Peso (PHP)
US\$ exchange rate:	42.55
GDP per capita (US\$):	4,700
GDP % change:	+6.8%
Total music revenues per capita (US\$):	0.1

INDUSTRY INFORMATION

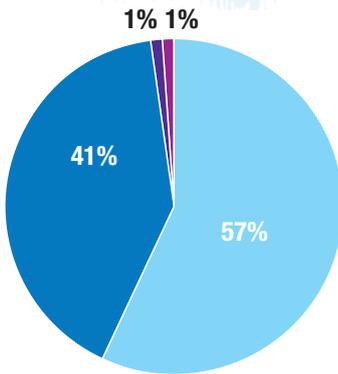
Performance rights music licensing company:
PMPPSI

DIGITAL INDICATORS IN MILLIONS

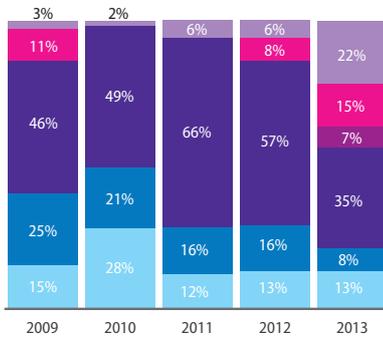
Internet users:	39.9
Broadband households:	1.6
Mobile subscriptions:	111.2
Active smartphones:	22.8
Active tablets:	1.0

WORLD RANKING

Physical:	41
Digital:	37
Performance rights:	54
Synchronisation:	34
Total market:	42



RECORDED MUSIC SALES BY SECTOR 2013 (VALUE)
 ■ Physical ■ Digital
 ■ Performance rights
 ■ Synchronisation



DIGITAL SALES BY FORMAT (VALUE)
 ■ Single track ■ Master ringtones
 ■ Ringback tunes ■ Full album
 ■ Ad-supported ■ Other

	Physical	Digital	Performance rights	Synchronisation revenue	Total (US\$)	Total (PHP)	Total % change
2013	7.9	5.6	0.1	0.1	13.8	588.4	-8.4%
2012	10.4	4.5	0.1	0.1	15.1	642.3	-7.7%
2011	11.4	4.9	0.1	0.1	16.3	695.7	-6.7%
2010	13.3	4.2	0.1		17.5	745.9	-10.7%
2009	16.3	3.4			19.6	835.0	+19.3%

	Physical	
	CD	Other physical
2013	1.5	0.2
2012	1.6	0.2
2011	2.0	0.3
2010	2.1	0.3
2009	2.5	0.6

TOP INDEPENDENT LABELS (ALPHABETICAL ORDER)

- _____ Able Music International, Inc.
- _____ Alpha Music Corporation
- _____ Dyna Music Entertainment Corporation
- _____ Galaxy Records
- _____ GMA Records
- _____ Ivory Music & Video
- _____ Polyeast Records
- _____ Praise, Inc.
- _____ Star Recording, Inc.
- _____ Universal Records
- _____ Vicor Music Corporation
- _____ Viva Records Corporation

SINGAPORE



SOCIAL AND ECONOMIC INDICATORS

Population (millions): 5.4
 Language: English, Mandarin, Malay, Tamil
 Currency: Singapore Dollar (SGD)
 US\$ exchange rate: 1.25
 GDP per capita (US\$): 68,541
 GDP % change: +2.5%
 Total music revenues per capita (US\$): 2.4

INDUSTRY INFORMATION

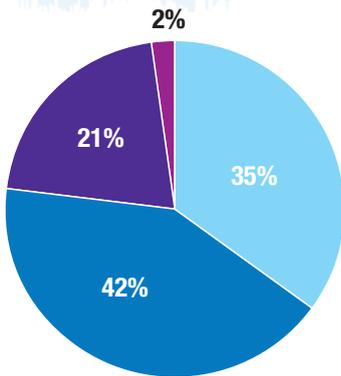
Performance rights music licensing company:
 RIPS www.rips.com.sg
 Local music industry association:
 RIAS www.rias.org.sg

DIGITAL INDICATORS IN MILLIONS

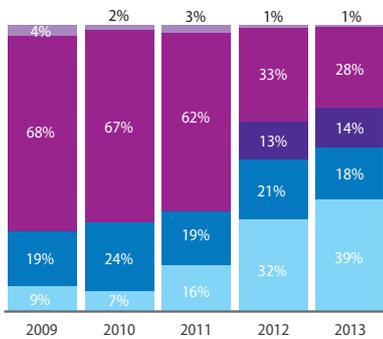
Internet users: 4.1
 Broadband households: 1.2
 Mobile subscriptions: 8.4
 Active smartphones: 5.7

WORLD RANKING

Physical: 43
 Digital: 38
 Performance rights: 37
 Synchronisation: 31
Total market: 43



RECORDED MUSIC SALES BY SECTOR 2013 (VALUE)
 Physical Digital
 Performance rights Synch



DIGITAL SALES BY FORMAT (VALUE)
 Downloads Mobile
 Ad-supported Subscriptions Other

	Physical	Digital	Performance rights	Synchronisation revenue	Total (US\$)	Total (SGD)	Total % change
2013	4.5	5.5	2.8	0.3	13.1	16.4	-10.9%
2012	8.0	4.3	2.1	0.3	14.7	18.4	-21.9%
2011	12.9	3.6	2.0	0.3	18.9	23.6	-11.6%
2010	15.8	3.8	1.7		21.4	26.7	-10.3%
2009	18.8	3.4	1.6		23.8	29.8	-9.6%

	Physical	
	CD	Other physical
2013	0.4	
2012	0.6	0.1
2011	1.1	
2010	1.3	0.1
2009	1.6	0.1

	Artist	Title	Company
1	Bruno Mars	Unorthodox Jukebox	Warner
2	Michael Bublé	To Be Loved	Warner
3	EXO	XOXO	Universal
4	Justin Timberlake	The 20/20 Experience	Sony
5	Jay Chou	Opus 12	Sony
6	One Direction	Midnight Memories	Sony
7	James Blunt	Moon Landing	Warner
8	Various Artists	Phantom Of The Opera	Universal
9	Girls' Generation	I Got A Boy	Universal
10	Various Artists	Les Miserables OST	Universal

TOP INDEPENDENT LABELS (ALPHABETICAL ORDER)

- EQ Music Pte Ltd
- HIM International Music Pte Ltd
- Life Record Industries Pte Ltd
- Ocean Butterflies Music Pte Ltd
- Rock Records (S) Pte Ltd

SOUTH KOREA



SOCIAL AND ECONOMIC INDICATORS

Population (millions):	49.0
Language:	Korean
Currency:	South Korean Won (KRW)
US\$ exchange rate:	1,098.97
GDP per capita (US\$):	33,200
GDP % change:	+2.8%
Total music revenues per capita (US\$):	4.3

INDUSTRY INFORMATION

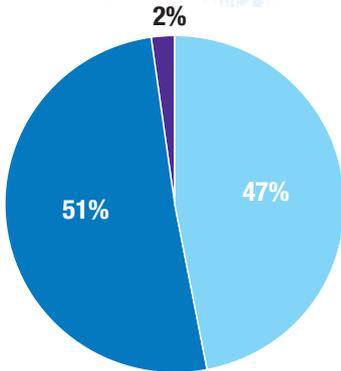
Chart compiler:	KMCIA
Performance rights music licensing company:	RIAK

DIGITAL INDICATORS IN MILLIONS

Internet users:	41.6
Broadband households:	14.9
Mobile subscriptions:	54.4
Active smartphones:	40.9
Active tablets:	5.8

WORLD RANKING

Physical:	11
Digital:	9
Performance rights:	31
Synchronisation:	22
Total market:	10

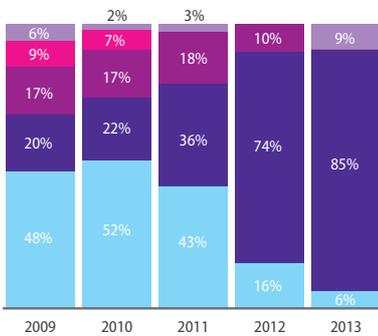


RECORDED MUSIC SALES BY SECTOR 2013 (VALUE)

	Physical	Digital	Performance rights	Synchronisation revenue	Total (US\$)	Total (KRW)	Total % change
2013	98.0	108.3	4.2	0.9	211.3	232,249.4	+9.7%
2012	105.6	82.0	4.5	0.6	192.7	211,803.5	-4.3%
2011	89.0	109.4	2.2	0.8	201.4	221,316.5	+6.4%
2010	85.2	103.2		1.0	189.4	208,094.1	+12.5%
2009	75.0	93.4			168.4	185,047.2	+10.2%

RECORDED MUSIC SALES VOLUME (MILLION UNITS)

	Physical	
	CD	Other physical
2013	10.9	0.4
2012	11.3	0.3
2011	10.1	0.2
2010	9.5	0.2
2009	8.8	0.3



DIGITAL SALES BY FORMAT (VALUE)

TOP SELLING SONGS 2013

	Artist	Title	Company
1	Psy	Gentleman	YG Entertainment
2	Bae Chi Gi	Teardrop Shower	YMC Entertainment
3	Sistar19	Gone Not Around Any Longer	Starship Entertainment
4	Roy Kim	Spring Spring Spring	CJ E&M
5	Leessang ft. Yujin	Tear	Double Kick Entertainment
6	4Minute	What's your name?	Cube Entertainment
7	Huh Gak ft. Yu Seung Woo	Mono Drama	A Cube Entertainment
8	Davichi	Turtle	Core Contents Media
9	Sistar	Give It To Me	Starship Entertainment
10	Davichi ft. Verbaljint	Melting Away	Core Contents Media

TOP INDEPENDENT LABELS (ALPHABETICAL ORDER)

BIG HIT Entertainment
CJ E&M
Core Contents Media
Cube Entertainment
DSP Media
JYP Entertainment
Loen Entertainment
SM Entertainment
Starship Entertainment
YG Entertainment

TOP SELLING ALBUMS 2013

	Artist	Title	Company
1	EXO	First Album Repackage XOXO (Kiss Ver.)	SM Entertainment
2	Girls' Generation	I Got a Boy	SM Entertainment
3	EXO	XOXO (Kiss Ver.)	SM Entertainment
4	EXO	Miracles in December (Korean Ver.)	SM Entertainment
5	Jo Yong Pil	Hello	Pil Records
6	EXO	XOXO (Hug Ver.)(Chinese)	SM Entertainment
7	EXO	XOXO (Hug Ver.)	SM Entertainment
8	G-Dragon	Coup D'Etat	YG Entertainment
9	SHINee	Dream Girl-The Misconceptions of You	SM Entertainment
10	EXO	Miracles in December (Chinese Ver.)	SM Entertainment

TAIWAN



SOCIAL AND ECONOMIC INDICATORS

Population (millions): 23.3
 Language: Mandarin Chinese
 Currency: Taiwan Dollar (TWD)
 US\$ exchange rate: 29.75
 GDP per capita (US\$): 39,600
 GDP % change: +2.2%
 Total music revenues per capita (US\$): 2.5

INDUSTRY INFORMATION

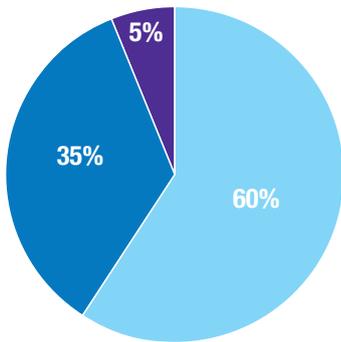
Performance rights music licensing company:
 ARCO www.arco.org.tw
 Local music industry association:
 RIT www.rit.org.tw

DIGITAL INDICATORS IN MILLIONS

Internet users: 17.9
 Broadband households: 5.2
 Mobile subscriptions: 30.7
 Active smartphones: 21.8
 Active tablets: 4.3

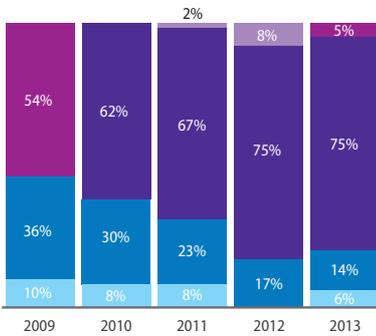
WORLD RANKING

Physical: 23
 Digital: 26
 Performance rights: 36
Total market: 27



RECORDED MUSIC SALES BY SECTOR 2013 (VALUE)
 Physical Digital Performance rights

	Physical	Digital	Performance rights	Synchronisation revenue	Total (US\$)	Total (TWD)	Total % change
2013	35.3	20.7	2.9		58.9	1,752.3	+2.0%
2012	39.7	15.6	2.5		57.7	1,717.5	-9.2%
2011	50.1	11.2	2.4		63.6	1,892.1	-2.1%
2010	54.3	8.6	2.1		65.0	1,933.4	+1.2%
2009	54.4	7.9	1.8		64.2	1,909.9	+4.0%



DIGITAL SALES BY FORMAT (VALUE)
 Downloads Mobile Subscriptions Ad-supported Other

	Physical	
	CD	Other physical
2013	2.3	0.5
2012	2.8	0.6
2011	3.6	0.5
2010	4.0	0.8
2009	3.9	0.9

TOP INDEPENDENT LABELS (ALPHABETICAL ORDER)

- Avex Taiwan Inc.
- Forward Music Co. Ltd.
- Gold Typhoon Music Co. Ltd
- HIM Int. Music Inc.
- JVR Music Int. Ltd.
- Linfair Records Limited
- Rock Records Co. Ltd.
- Seed Music Co. Ltd.

THAILAND



SOCIAL AND ECONOMIC INDICATORS

Population (millions):	67.5
Language:	Thai
Currency:	Thai Baht (THB)
US\$ exchange rate:	30.80
GDP per capita (US\$):	9,900
GDP % change:	+3.1%
Total music revenues per capita (US\$):	0.9

INDUSTRY INFORMATION

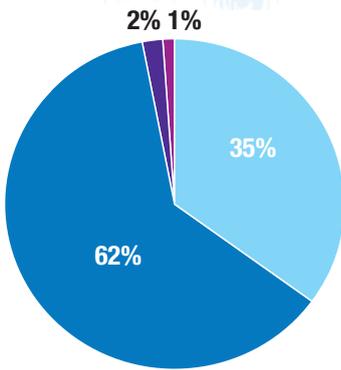
Performance rights music licensing company:	Phonorights / MPC Music.Co.Ltd www.mpcmusic.co.th
Local music industry association:	TECA www.teca.co.th

DIGITAL INDICATORS IN MILLIONS

Internet users:	22.1
Broadband households:	4.6
Mobile subscriptions:	98.6
Active smartphones:	23.0

WORLD RANKING

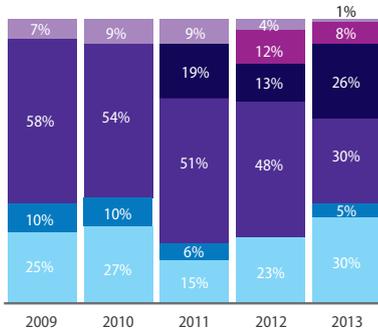
Physical:	29
Digital:	21
Performance rights:	46
Synchronisation:	23
Total market:	28



RECORDED MUSIC SALES BY SECTOR 2013 (VALUE)

	Physical	Digital	Performance rights	Synchronisation revenue	Total (US\$)	Total (THB)	Total % change
2013	20.2	36.0	1.0	0.8	58.0	1,786.8	-6.7%
2012	24.9	35.6	1.0	0.6	62.2	1,915.6	-8.9%
2011	26.0	40.8	0.8	0.6	68.3	2,102.7	-5.2%
2010	29.0	42.1	0.4	0.5	72.0	2,217.4	-7.0%
2009	38.0	39.0	0.4		77.4	2,383.1	+5.0%

	Physical	
	CD	Other physical
2013	2.7	3.4
2012	2.9	4.3
2011	3.3	4.5
2010	3.6	4.9
2009	4.6	6.7



DIGITAL SALES BY FORMAT (VALUE)

TOP INDEPENDENT LABELS (ALPHABETICAL ORDER)

- BEC-TERO Music
- Believe Record Co.,Ltd
- GMM Grammy Public Co. Ltd.
- KPN Music Co.,Ltd
- RS. Promotion Public Co. Ltd.
- Small Room Co.Ltd
- Spicy Disc Co.,Ltd
- Topline Music Co.,Ltd

AUSTRALIA



SOCIAL AND ECONOMIC INDICATORS

Population (millions):	22.3
Language:	English
Currency:	Australian Dollar (AUD)
US\$ exchange rate:	1.04
GDP per capita (US\$):	43,000
GDP % change:	+2.5%
Total music revenues per capita (US\$):	19.3

INDUSTRY INFORMATION

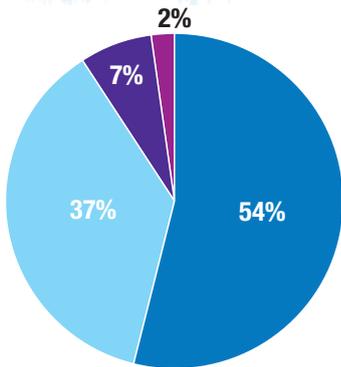
Chart compiler:	ARIA www.aria.com.au
Performance rights music licensing company:	PPCA www.pcca.com.au
Local music industry association:	ARIA www.aria.com.au

DIGITAL INDICATORS IN MILLIONS

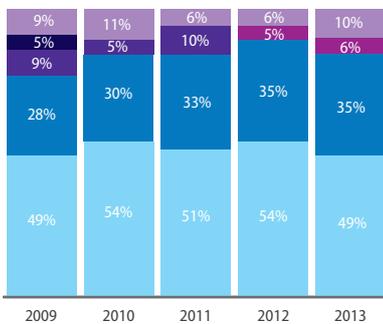
Internet users:	19.6
Broadband households:	5.4
Mobile subscriptions:	30.6
Active smartphones:	14.5
Active tablets:	5.5

WORLD RANKING

Physical:	7
Digital:	5
Performance rights:	8
Synchronisation:	6
Total market:	6



RECORDED MUSIC SALES BY SECTOR 2013 (VALUE) Physical Digital Performance rights Synch



DIGITAL SALES BY FORMAT (VALUE) Single track Full album Mobile Subscriptions Ad-supported Other

Year	Physical	Digital	Performance rights	Synchronisation revenue	Total (US\$)	Total (AUD)	Total % change
2013	159.6	231.1	30.8	9.3	430.8	448.1	-8.4%
2012	214.2	218.9	28.6	8.9	470.6	489.4	+6.4%
2011	242.6	167.9	24.1	7.7	442.2	459.9	+5.6%
2010	279.9	111.5	20.0	7.6	418.9	435.7	-10.8%
2009	367.5	84.4	17.5		469.4	488.2	+4.3%

Year	Physical		Digital	
	CD	Other physical	Single tracks	Digital albums
2013	14.8	1.7	107.0	7.4
2012	19.8	2.2	138.0	8.5
2011	21.4	2.1	78.4	6.0
2010	24.5	2.7	48.9	3.7
2009	29.4	4.6	34.3	2.5

	Artist	Title	Company
1	Katy Perry	Roar	Capitol/EMI
2	Robin Thicke ft. T.I. + Pharrell	Blurred Lines	Interscope/Universal
3	Passenger	Let Her Go	Inertia
4	Avicii	Wake me up!	Universal
5	Lorde	The Love Club EP ft. Royals	Universal
6	P!nk ft. Nate Ruess	Just Give Me A Reason	RCA/ Sony
7	Daft Punk ft. Pharrell	Get Lucky	Columbia/Sony
8	One Republic	Counting Stars	Interscope/Universal
9	Macklemore & Ryan Lewis ft. Ray Dalton	Can't Hold Us	Macklemore
10	James Arthur	Impossible	SYCO/Sony

ABC Music
Inertia
Liberation
Ministry of Sound
MGM

	Artist	Title	Company
1	P!nk	The Truth About Love	RCA/Sony
2	Katy Perry	Prism	Capitol/EMI
3	Bruno Mars	Unorthodox Jukebox	Atlantic/Warner
4	Michael Bublé	To Be Loved	Reprise/Warner
5	Daft Punk	Random Access Memories	Columbia/Sony
6	One Direction	Midnight Memories	SYCO/Sony
7	Michael Bublé	Christmas	Reprise/Warner
8	Eminem	The Marshall Mathers LP2	Interscope/Universal
9	Lorde	Pure Heroine	Universal
10	Passenger	All The Little Lights	Inertia

NEW ZEALAND



SOCIAL AND ECONOMIC INDICATORS

Population (millions): 4.4
 Language: English
 Currency: New Zealand Dollar (NZD)
 US\$ exchange rate: 1.22
 GDP per capita (US\$): 30,400
 GDP % change: +2.5%
 Total music revenues per capita (US\$): 11.9

INDUSTRY INFORMATION

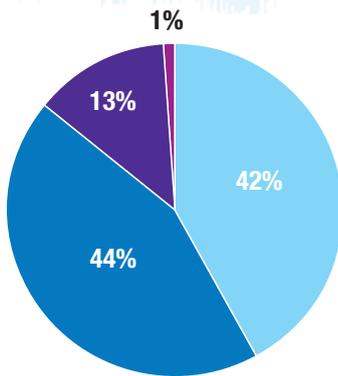
Chart compiler: Media Sauce
www.nztop40.co.nz
 Performance rights music licensing company:
 Recorded Music New Zealand Limited
www.recordedmusic.co.nz
 Local music industry association: Recorded Music
 New Zealand Limited www.recordedmusic.co.nz

DIGITAL INDICATORS IN MILLIONS

Internet users: 4.1
 Broadband households: 1.1
 Mobile subscriptions: 5.3
 Active smartphones: 2.0
 Active tablets: 1.0

WORLD RANKING

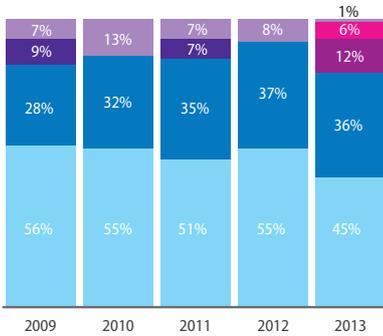
Physical: 28
 Digital: 24
 Performance rights: 25
 Synchronisation: 27
Total market: 29



RECORDED MUSIC SALES BY SECTOR 2013 (VALUE)
 Physical Digital Performance rights Synch

	Physical	Digital	Performance rights	Synchronisation revenue	Total (US\$)	Total (NZD)	Total % change
2013	22.2	22.8	6.9	0.5	52.4	63.9	-8.7%
2012	29.1	20.9	6.8	0.6	57.4	70.0	-2.1%
2011	33.9	17.2	6.6	1.0	58.7	71.6	-1.7%
2010	41.5	11.8	5.2	1.1	59.7	72.8	-15.6%
2009	57.6	7.3	5.9		70.7	86.3	-1.8%

	Physical		Digital	
	CD	Other physical	Single tracks	Digital albums
2013	2.3	0.1	9.2	1.0
2012	2.9	0.2	10.1	1.0
2011	3.1	0.3	8.3	0.7
2010	3.6	0.3	5.5	
2009	4.6	0.5		



DIGITAL SALES BY FORMAT (VALUE)
 Single track Full album Mobile Subscriptions Ad-supported Other

	Artist	Title	Company
1	Robin Thicke ft. T.I. + Pharrell	Blurred Lines	Universal
2	Lorde	Royals	Universal
3	Katy Perry	Roar	Capitol/Universal
4	P!nk ft. Nate Ruess	Just Give Me A Reason	Sony
5	James Arthur	Impossible	Sony
6	Passenger	Let Her Go	Black Crow/Rhythm
7	Imagine Dragons	Radioactive	Universal
8	Avicii	Wake me up!	Universal
9	Daft Punk ft. Pharrell	Get Lucky	Sony
10	Bruno Mars	When I Was Your Man	Warner

TOP INDEPENDENT LABELS (ALPHABETICAL ORDER)

- Digital Rights Management
- Frequency Media Group
- Illegal Musik
- Liberation Music (NZ)
- Ode Records
- Rhythmethod
- The Drop
- Tru-tone Recordings

TOP SELLING ALBUMS 2013

	Artist	Title	Company
1	Sol3 Mio	Sol3 Mio	Universal
2	Lorde	Pure Heroine	Universal
3	Bruno Mars	Unorthodox Jukebox	Warner
4	P!nk	The Truth About Love: Fan Edition	Sony
5	Lorde	The Love Club EP	Universal
6	Ed Sheeran	Plus	Warner
7	One Direction	Midnight Memories	Sony
8	Katy Perry	Prism	Capitol/Universal
9	Fleetwood Mac	25 Years: The Chain Box Set	Warner
10	Fat Freddy's Drop	Blackbird	The Drop/Rhythm/DRM

ARGENTINA



SOCIAL AND ECONOMIC INDICATORS

Population (millions):	42.6
Language:	Spanish
Currency:	Argentine Peso (ARS)
US\$ exchange rate:	5.48
GDP per capita (US\$):	18,600
GDP % change:	+3.5%
Total music revenues per capita (US\$):	1.6

INDUSTRY INFORMATION

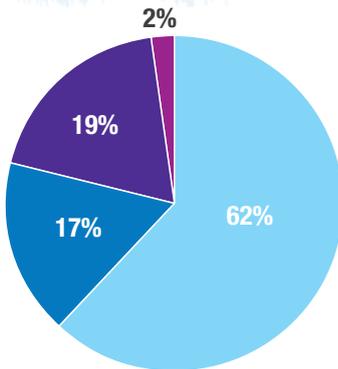
Chart compiler:	CAPIF www.capif.org.ar
Performance rights music licensing company:	CAPIF www.capif.org.ar
Local music industry association:	CAPIF www.capif.org.ar

DIGITAL INDICATORS IN MILLIONS

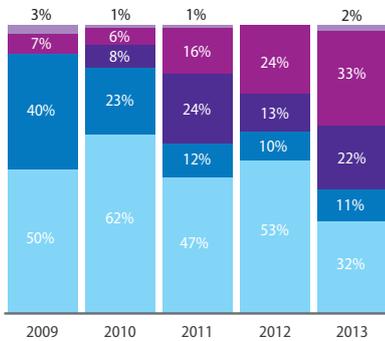
Internet users:	25.0
Broadband households:	5.2
Mobile subscriptions:	64.0
Active smartphones:	17.1
Active tablets:	1.7

WORLD RANKING

Physical:	19
Digital:	29
Performance rights:	16
Synchronisation:	20
Total market:	22



RECORDED MUSIC SALES BY SECTOR 2013 (VALUE) ■ Physical ■ Digital ■ Performance rights ■ Synch



DIGITAL SALES BY FORMAT (VALUE) ■ Downloads ■ Mobile ■ Subscriptions ■ Ad-supported ■ Other

	Physical	Digital	Performance rights	Synchronisation revenue	Total (US\$)	Total (ARS)	Total % change
2013	43.8	11.9	13.3	1.1	70.2	384.6	+13.9%
2012	42.6	7.1	10.5	1.4	61.6	337.6	+19.2%
2011	38.2	4.8	7.7	0.9	51.7	283.3	+28.5%
2010	29.4	4.7	5.6	0.5	40.2	220.4	+11.8%
2009	28.9	2.6	4.5		36.0	197.2	-1.9%

	Physical		Digital
	CD	Other physical	Digital albums
2013	9.0	1.3	0.1
2012	10.8	1.6	0.1
2011	11.3	1.6	0.1
2010	10.8	1.2	0.2
2009	10.7	1.4	

	Artist	Title	Company
1	Various Artists	Violetta – Hoy Somos Más	Disney
2	Abel Pintos	Abel	Sony
3	Various Artists	Violetta – Cantar Es Lo Que Soy	Disney
4	One Direction	Midnight Memories	Sony
5	Various Artists	Violetta En Vivo	Disney
6	Abel Pintos	Sueño Dorado	Sony
7	Various Artists	Violetta	Disney
8	No te va gustar	El Calor Del Pleno Invierno	Por Art/Sony
9	Tan Biónica	Destinología	Universal
10	Topa	Me Nuevo Para Aquí	Disney

TOP INDEPENDENT LABELS (ALPHABETICAL ORDER)

- Acqua
- BGM - Magenta
- DBN
- Del Angel Feg
- Epsa Music
- Leader Music
- Music Brokers
- Pro.Com
- Pop Art
- Random
- Walt Disney Records

BRAZIL



SOCIAL AND ECONOMIC INDICATORS

Population (millions): 201.0
 Language: Portuguese
 Currency: Brazilian Real (BRL)
 US\$ exchange rate: 2.16
 GDP per capita (US\$): 12,100
 GDP % change: +2.5%
 Total music revenues per capita (US\$): 1.1

INDUSTRY INFORMATION

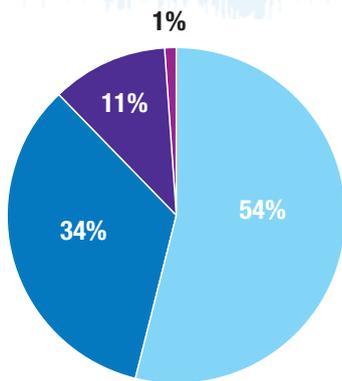
Chart compiler: ABPD www.abpd.org.br
 Performance rights music licensing company:
 ABRAMUS www.abramus.org.br
 Local music industry association:
 ABPD www.abpd.org.br

DIGITAL INDICATORS IN MILLIONS

Internet users: 107.9
 Broadband households: 18.3
 Mobile subscriptions: 273.4
 Active smartphones: 46.3
 Active tablets: 7.9

WORLD RANKING

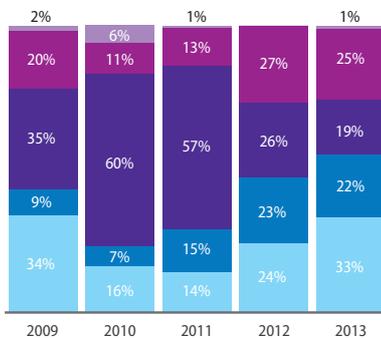
Physical: 9
 Digital: 11
 Performance rights: 11
 Synchronisation: 13
Total market: 9



RECORDED MUSIC SALES BY SECTOR 2013 (VALUE)

Physical Digital

Performance rights Synch



DIGITAL SALES BY FORMAT (VALUE)

Downloads Mobile

Subscriptions Ad-supported
Other

RECORDED MUSIC REVENUE (US\$ MILLIONS, TRADE VALUE)

	Physical	Digital	Performance rights	Synchronisation revenue	Total (US\$)	Total (BRL)	Total % change
2013	122.3	77.4	26.4	1.8	227.9	492.3	-1.7%
2012	144.8	63.3	21.8	2.0	231.8	500.7	+8.2%
2011	160.9	35.1	16.8	1.4	214.3	462.9	+13.9%
2010	141.3	31.2	14.7	0.9	188.1	406.4	-0.7%
2009	153.2	24.7	11.6		189.5	409.4	+0.5%

RECORDED MUSIC SALES VOLUME (MILLION UNITS)

	Physical	
	CD	Other physical
2013	20.0	6.2
2012	21.8	8.2
2011	21.5	8.1
2010	20.7	7.3
2009	22.8	6.0

TOP SELLING ALBUMS 2013

	Artist	Title	Company
1	Padre Marcelo Rossi	Já Deu Tudo Certo (EP)	Sony
2	Roberto Carlos	Remixed (EP)	Sony
3	Paula Fernandes	Um Ser Amor (EP)	Universal
4	Paula Fernandes	Edição Especial	Universal
5	Anitta	Anitta	Warner
6	Paula Fernandes	Multishow Ao Vivo	Universal
7	Luan Santana	O Nosso Tempo é Hoje	Som Livre
8	Damães	O Maior Troféu	Sony
9	Padre Reginaldo Manzotti	Faça-me Crer	Som Livre
10	One Direction	Midnight Memories	Sony

TOP INDEPENDENT LABELS (ALPHABETICAL ORDER)

Atracao Fonografica
 Biscoito Fino
 Building Records
 Deck Disk
 MK Music
 Radar Records
 Som Livre
 ST2 Music

CENTRAL AMERICA & CARIBBEAN*



SOCIAL AND ECONOMIC INDICATORS

Population (millions): 42.2
 Language: Spanish, English
 Currency: US Dollar (USD)
 US\$ exchange rate: 1.00
 GDP per capita (US\$): 9,123
 GDP % change: +2.6%
 Total music revenues per capita (US\$): 0.2

INDUSTRY INFORMATION

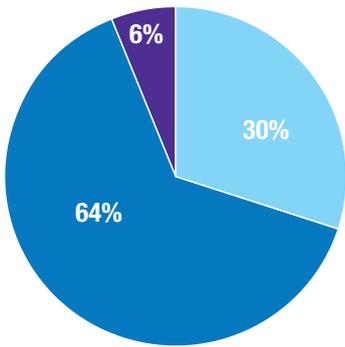
Performance rights music licensing company:
 Barbados: COSCAP
 Costa Rica: FONOTICA
 Dominican Republic: SODINPRO
 El Salvador: ASAP
 Guatemala: AGINPRO
 Jamaica: JAMMS
 Panama: PRODUCE

DIGITAL INDICATORS IN MILLIONS

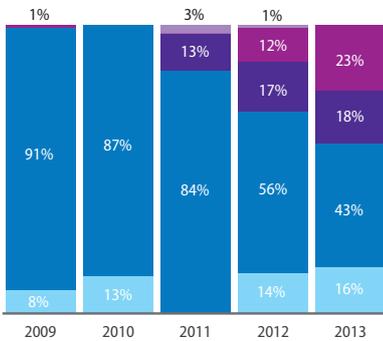
Internet users: 16.0
 Broadband households: 2.0

WORLD RANKING

Physical: 48
 Digital: 39
 Performance rights: 49
Total market: 41



RECORDED MUSIC SALES BY SECTOR 2013 (VALUE)
 Physical Digital Performance rights



DIGITAL SALES BY FORMAT (VALUE)
 Downloads Mobile Subscriptions Ad-supported Other

Year	Physical	Digital	Performance rights	Synchronisation revenue	Total (US\$)	Total (USD)	Total % change
2013	2.5	5.3	0.5		8.4	8.4	+2.2%
2012	2.7	4.9	0.5	0.1	8.2	8.2	+11.5%
2011	3.1	3.9	0.3		7.3	7.3	-16.6%
2010	4.2	4.2	0.4		8.8	8.8	+1.3%
2009	4.9	3.4	0.4		8.7	8.7	-12.7%

Year	Physical	
	CD	Other physical
2013	0.4	
2012	0.4	
2011	0.4	0.1
2010	0.8	
2009	0.5	

* Includes: Barbados, Costa Rica, Dominican Republic, El Salvador, Guatemala, Jamaica, Panama

TOP INDEPENDENT LABELS (ALPHABETICAL ORDER)

- DDM Distribuidora De Musica S.A
- Papaya Music S.A
- Producciones Butaca S.A

CHILE



SOCIAL AND ECONOMIC INDICATORS

Population (millions): 17.2
 Language: Spanish
 Currency: Chilean Peso (CLP)
 US\$ exchange rate: 495.79
 GDP per capita (US\$): 19,100
 GDP % change: +4.4%
 Total music revenues per capita (US\$): 1.4

INDUSTRY INFORMATION

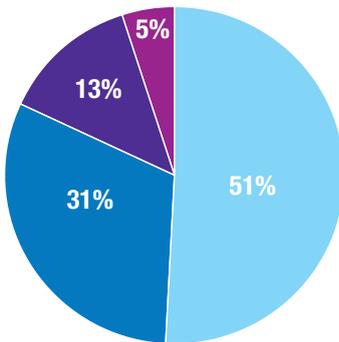
Performance rights music licensing company:
 PROFOVI www.profovi.cl
 Local music industry association:
 IFPI Chile www.ifpichile.cl

DIGITAL INDICATORS IN MILLIONS

Internet users: 11.2
 Broadband households: 1.8
 Mobile subscriptions: 26.9
 Active smartphones: 6.1
 Active tablets: 0.6

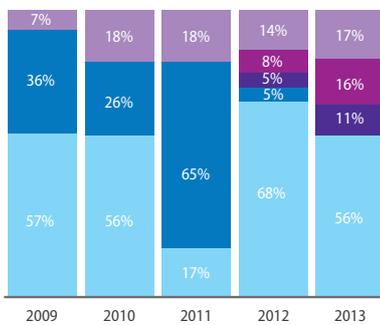
WORLD RANKING

Physical: 36
 Digital: 34
 Performance rights: 34
 Synchronisation: 19
Total market: 36



RECORDED MUSIC SALES BY SECTOR 2013 (VALUE)

Physical Digital
 Performance rights Synch



DIGITAL SALES BY FORMAT (VALUE)

Downloads Mobile
 Subscriptions Ad-supported
 Other

RECORDED MUSIC REVENUE (US\$ MILLIONS, TRADE VALUE)

	Physical	Digital	Performance rights	Synchronisation revenue	Total (US\$)	Total (CLP)	Total % change
2013	12.2	7.3	3.3	1.2	24.0	11,911.4	+2.6%
2012	14.3	5.0	2.9	1.2	23.4	11,613.8	+34.4%
2011	10.7	3.8	2.4	0.4	17.4	8,644.2	-1.4%
2010	9.7	5.4	2.1	0.4	17.7	8,766.7	+6.6%
2009	9.8	4.7	2.1	0.4	16.6	8,221.6	-14.5%

RECORDED MUSIC SALES VOLUME (MILLION UNITS)

	Physical	
	CD	Other physical
2013	3.2	0.3
2012	3.2	0.7
2011	2.9	0.4
2010	2.3	0.2
2009	0.9	0.1

TOP INDEPENDENT LABELS (ALPHABETICAL ORDER)

Alerce Producciones
 Discos CNR
 JCM Discografica
 Leader Music
 Oveja Negra

COLOMBIA



SOCIAL AND ECONOMIC INDICATORS

Population (millions): 45.7
 Language: Spanish
 Currency: Colombian Peso (COP)
 US\$ exchange rate: 1,871.10
 GDP per capita (US\$): 11,100
 GDP % change: +4.2%
 Total music revenues per capita (US\$): 0.5

INDUSTRY INFORMATION

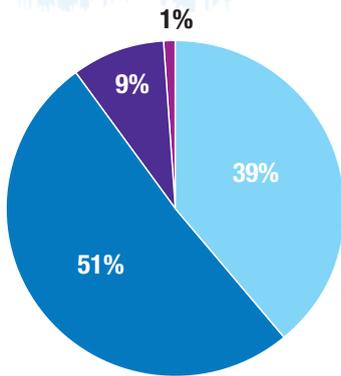
Performance rights music licensing company:
 ACINPRO www.acinpro.org.co
 Local music industry association:
 APDIF www.apdifcolombia.com

DIGITAL INDICATORS IN MILLIONS

Internet users: 25.8
 Broadband households: 3.7
 Mobile subscriptions: 47.6
 Active smartphones: 5.4
 Active tablets: 0.3

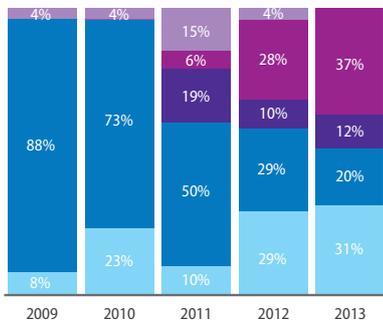
WORLD RANKING

Physical: 39
 Digital: 31
 Performance rights: 40
 Synchronisation: 33
Total market: 38



RECORDED MUSIC SALES BY SECTOR 2013 (VALUE)
 Physical Digital Performance rights Synchronisation

	Physical	Digital	Performance rights	Synchronisation revenue	Total (US\$)	Total (COP)	Total % change
2013	8.5	10.9	2.0	0.2	21.5	40,292.1	+7.1%
2012	10.6	5.9	3.4	0.2	20.1	37,623.6	+11.4%
2011	10.8	4.0	3.2		18.0	33,771.6	-2.8%
2010	11.5	4.3	2.8		18.6	34,747.9	-24.1%
2009	16.3	5.4	2.8		24.5	45,785.7	-22.0%



DIGITAL SALES BY FORMAT (VALUE)
 Downloads Mobile Subscriptions Ad-supported Other

	Physical	
	CD	Other physical
2013	1.8	0.3
2012	1.6	0.9
2011	2.2	0.4
2010	1.9	0.2
2009	2.3	0.3

TOP INDEPENDENT LABELS (ALPHABETICAL ORDER)

- Balboa
- Codiscos
- Discos Fuentes
- Star Arsis

ECUADOR



SOCIAL AND ECONOMIC INDICATORS

Population (millions): 15.4
 Language: Spanish
 Currency: Ecuadorian Sucre (ECS)
 US\$ exchange rate: 25,587.00
 GDP per capita (US\$): 10,600
 GDP % change: +4.0%
 Total music revenues per capita (US\$): 0.1

INDUSTRY INFORMATION

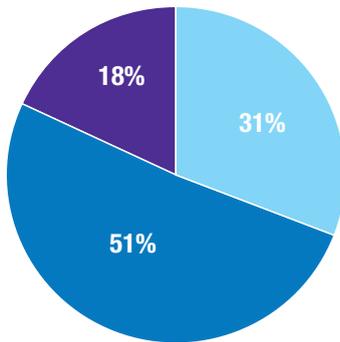
Performance rights music licensing company:
 SOPROFON www.soprofon.ec

DIGITAL INDICATORS IN MILLIONS

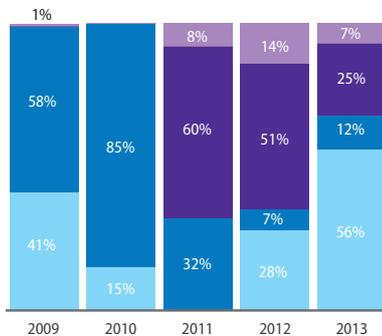
Internet users: 5.8
 Broadband households: 1.1

WORLD RANKING

Physical: 51
 Digital: 46
 Performance rights: 53
 Synchronisation: 43
Total market: 54



RECORDED MUSIC SALES BY SECTOR 2013 (VALUE)
 Physical Digital
 Performance rights



DIGITAL SALES BY FORMAT (VALUE)
 Downloads Mobile
 Subscriptions Other

RECORDED MUSIC REVENUE (US\$ MILLIONS, TRADE VALUE)

	Physical	Digital	Performance rights	Synchronisation revenue	Total (US\$)	Total (ECS)	Total % change
2013	0.6	0.9	0.3		1.8	46,092.4	-17.0%
2012	0.7	1.2	0.3		2.2	55,532.3	-6.0%
2011	1.0	1.1	0.2		2.3	59,058.4	-19.6%
2010	1.0	1.8	0.1		2.9	73,500.9	+73.8%
2009	1.2	0.4	0.1		1.7	42,290.5	+5.5%

RECORDED MUSIC SALES VOLUME (MILLION UNITS)

	Physical
	CD
2013	0.1
2012	0.1
2011	0.1
2010	0.1
2009	0.2

TOP INDEPENDENT LABELS (ALPHABETICAL ORDER)

Borkis Entertainment
 Damiano Producciones
 El Abasto Producciones
 Parramont Producciones
 Productores Independientes
 Raffo Producciones

MEXICO



SOCIAL AND ECONOMIC INDICATORS

Population (millions):	118.8
Language:	Spanish
Currency:	Mexican Peso (MXN)
US\$ exchange rate:	12.76
GDP per capita (US\$):	15,600
GDP % change:	+1.2%
Total music revenues per capita (US\$):	1.1

INDUSTRY INFORMATION

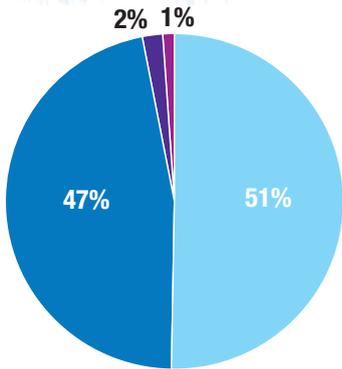
Performance rights music licensing company:	SOMEXFON www.somexfon.com
Local music industry association:	AMPROFON www.amprofon.com.mx

DIGITAL INDICATORS IN MILLIONS

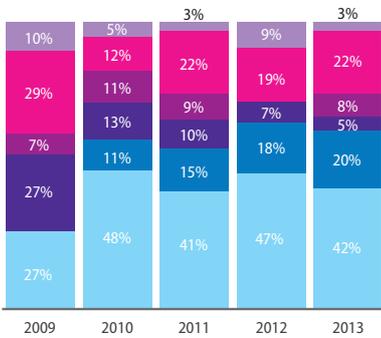
Internet users:	49.4
Broadband households:	10.3
Mobile subscriptions:	100.2
Active smartphones:	22.8
Active tablets:	4.0

WORLD RANKING

Physical:	14
Digital:	16
Performance rights:	38
Synchronisation:	15
Total market:	14



RECORDED MUSIC SALES BY SECTOR 2013 (VALUE) Physical Digital Performance rights Synchronisation



DIGITAL SALES BY FORMAT (VALUE) Single track Full album Mobile Subscriptions Ad-supported Other

Year	Physical	Digital	Performance rights	Synchronisation revenue	Total (US\$)	Total (MXN)	Total % change
2013	68.2	63.2	2.3	1.6	135.4	1,727.2	-4.4%
2012	85.8	52.6	1.9	1.3	141.6	1,806.7	+2.8%
2011	96.2	38.6	2.0	1.1	137.8	1,758.3	+6.3%
2010	98.6	28.0	1.5	1.4	129.6	1,653.3	+1.2%
2009	108.1	18.9	1.1		128.1	1,634.4	+0.2%

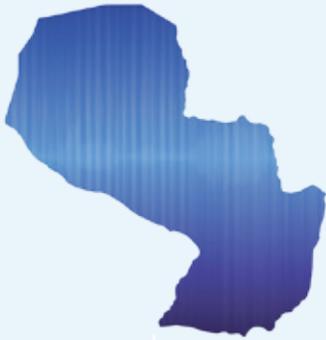
Year	Physical	
	CD	Other physical
2013	13.3	1.8
2012	17.7	1.4
2011	22.9	1.0
2010	19.8	1.2
2009	22.1	1.6

Rank	Artist	Title	Company
1	Bruno Mars	Locked Out Of Heaven	Universal
2	Daft Punk ft. Pharrell	Get Lucky	Sony
3	P!nk ft. Nate Ruess	Just Give Me A Reason	Sony
4	Pulcinho Pio	El Pollito Pio	Sony
5	Pitbull ft. Christina Aguilera	Feel This Moment	Universal/Fonovisa
6	Robin Thicke ft. T.I. + Pharrell	Blurred Lines	Warner
7	Bruno Mars	When I Was Your Man	Universal/Disa
8	Will.I.Am ft. Britney Spears	Scream & Shout	Sony
9	Katy Perry	Roar	Universal
10	Avicii	Wake Me Up!	Sony

Azteca Records
Discos Intolerancia
FT Music
Marketing Musical
Movic Records
Multimusic
Sei-Track Music
Vástago Producciones
WDC México

Rank	Artist	Title	Company
1	Alejandro Fernández	Confidencias	Universal
2	One Direction	Midnight Memories	Sony
3	Sasha, Benny y Erik	Primera Fila: Sasha Benny Erik	Sony
4	One Direction	Take Me Home	Sony
5	Thalía	Habítame Siempre	Sony
6	Daft Punk	Random Access Memories	Sony
7	Bruno Mars	Unorthodox Jukebox	Warner
8	Justin Bieber	Believe	Universal
9	Los Ángeles Azules	Cómo Te Voy A Olvidar	Sony
10	Jenni Rivera	Joyas Prestadas: Pop	Universal/Fonovisa

PARAGUAY



SOCIAL AND ECONOMIC INDICATORS

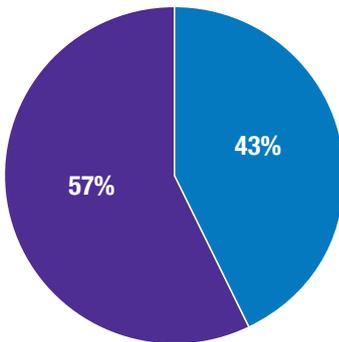
Population (millions): 6.6
Language: Spanish, Guaraní
Currency: Paraguay Guarani (PYG)
US\$ exchange rate: 4,409.69
GDP per capita (US\$): 6,800
GDP % change: +12.0%
Total music revenues per capita (US\$): 0.1

WORLD RANKING

Digital: 50
Performance rights: 50
Total market: 56

DIGITAL INDICATORS IN MILLIONS

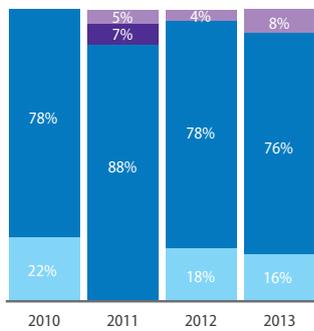
Internet users: 2.2
Broadband households: 0.1



RECORDED MUSIC SALES BY SECTOR 2013 [VALUE]

- Digital
- Performance rights

RECORDED MUSIC REVENUE (US\$ MILLIONS, TRADE VALUE)							
	Physical	Digital	Performance rights	Synchronisation revenue	Total (US\$)	Total (PYG)	Total % change
2013		0.4	0.5		0.9	3,780.5	+23.4%
2012		0.3	0.4		0.7	3,063.5	-17.5%
2011		0.6	0.3		0.8	3,711.3	+75.0%
2010		0.2	0.2		0.5	2,120.5	+197.0%
2009			0.2		0.2	714.0	+25.0%



DIGITAL SALES BY FORMAT [VALUE]

- Downloads
- Mobile
- Ad-supported
- Other

PERU



SOCIAL AND ECONOMIC INDICATORS

Population (millions): 29.8
 Language: Spanish, Quechua, Aymara
 Currency: Peruvian Nuevo Sol (PEN)
 US\$ exchange rate: 2.75
 GDP per capita (US\$): 11,100
 GDP % change: +5.1%
 Total music revenues per capita (US\$): 0.2

INDUSTRY INFORMATION

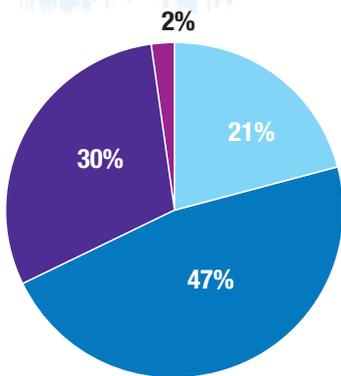
Performance rights music licensing company:
 UNIMPRO

DIGITAL INDICATORS IN MILLIONS

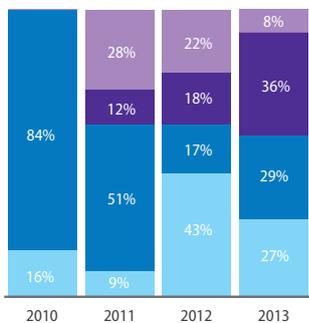
Internet users: 12.6
 Broadband households: 1.6
 Mobile subscriptions: 30.3
 Active smartphones: 4.8
 Active tablets: 1.0

WORLD RANKING

Physical: 49
 Digital: 42
 Performance rights: 41
 Synchronisation: 35
Total market: 48



RECORDED MUSIC SALES BY SECTOR 2013 (VALUE)
 Physical Digital
 Performance rights Synchronisation



DIGITAL SALES BY FORMAT (VALUE)
 Downloads Mobile
 Ad-supported Subscriptions

	Physical	Digital	Performance rights	Synchronisation revenue	Total (US\$)	Total (PEN)	Total % change
2013	1.3	3.0	2.0	0.1	6.4	17.7	+61.0%
2012	1.3	1.2	1.4		4.0	11.0	+29.2%
2011	1.4	0.8	0.9		3.1	8.5	-2.7%
2010	1.5	0.6	1.0		3.2	8.7	+33.7%
2009	1.7		0.7		2.4	6.5	+9.3%

	Physical
	CD
2013	0.2
2012	0.2
2011	0.2
2010	0.2
2009	0.1

TOP INDEPENDENT LABELS (ALPHABETICAL ORDER)

- Caracola Industrias Del Entretenimiento S.A.C
- Distribuidora Y Ventas S.A.C
- El Justiciero S. A
- Industria Fonografica Peruana S.A
- Kincha S.A.C
- Marisol Y Orquesta Magia Del Norte E.I.R.L
- O G Representaciones Discograficas S.A.C
- Producciones IEMPSA S.A.C
- Solver Productions S.A
- Xendra Music S.R.L

URUGUAY



SOCIAL AND ECONOMIC INDICATORS

Population (millions): 3.3
 Language: Spanish
 Currency: Uruguayan Peso (UYU)
 US\$ exchange rate: 20.83
 GDP per capita (US\$): 16,600
 GDP % change: +3.5%
 Total music revenues per capita (US\$): 1.3

INDUSTRY INFORMATION

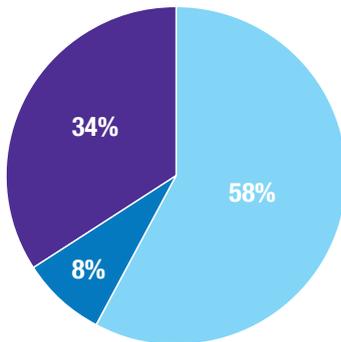
Performance rights music licensing company:
 CUD www.cudisco.org

DIGITAL INDICATORS IN MILLIONS

Internet users: 2.0
 Broadband households: 0.7
 Mobile subscriptions: 5.3
 Active smartphones: 1.0

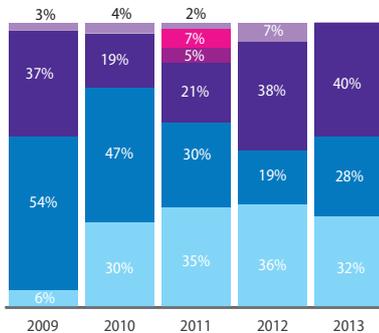
WORLD RANKING

Physical: 47
 Digital: 51
 Performance rights: 44
 Synchronisation: 45
Total market: 50



RECORDED MUSIC SALES BY SECTOR 2013 (VALUE)

Physical Digital
 Performance rights



DIGITAL SALES BY FORMAT (VALUE)

Single track Master ringtones
 Ringback tunes Subscriptions
 Ad-supported Other

RECORDED MUSIC REVENUE (US\$ MILLIONS, TRADE VALUE)

	Physical	Digital	Performance rights	Synchronisation revenue	Total (US\$)	Total (JYU)	Total % change
2013	2.6	0.3	1.5		4.4	92.2	-10.4%
2012	3.3	0.2	1.4		4.9	103.0	+12.5%
2011	2.9	0.4	1.1		4.4	91.5	+14.8%
2010	2.6	0.3	0.9		3.8	79.7	-14.4%
2009	3.2	0.4	0.8		4.5	93.2	+21.0%

RECORDED MUSIC SALES VOLUME (MILLION UNITS)

	Physical	
	CD	Other physical
2013	0.4	
2012	0.5	
2011	0.5	
2010	0.4	0.1
2009	0.5	0.1

TOP INDEPENDENT LABELS (ALPHABETICAL ORDER)

Ayui Tacuabe

Bizarro

Montevideo Music Group

Sondor

VENEZUELA



SOCIAL AND ECONOMIC INDICATORS

Population (millions): 28.5
 Language: Spanish
 Currency: Venezuelan Bolivar Fuerte (VEF)
 US\$ exchange rate: 6.07
 GDP per capita (US\$): 13,600
 GDP % change: +1.6%
 Total music revenues per capita (US\$): 0.7

INDUSTRY INFORMATION

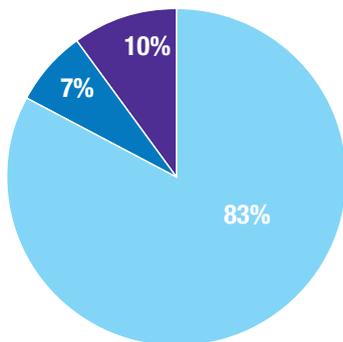
Performance rights music licensing company:
 AVINPRO www.avinpro.com

DIGITAL INDICATORS IN MILLIONS

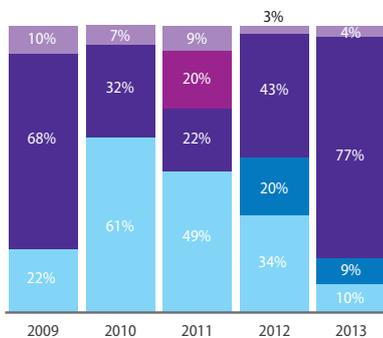
Internet users: 14.6
 Broadband households: 2.2
 Mobile subscriptions: 35.5
 Active smartphones: 6.5

WORLD RANKING

Physical: 34
 Digital: 44
 Performance rights: 39
Total market: 39



RECORDED MUSIC SALES BY SECTOR 2013 (VALUE)
 Physical Digital Performance rights



DIGITAL SALES BY FORMAT (VALUE)
 Single track Full album Mobile Ad-supported Other

	Physical	Digital	Performance rights	Synchronisation revenue	Total (US\$)	Total (VEF)	Total % change
2013	16.6	1.4	2.1		20.1	122.1	+33.4%
2012	12.8	0.7	1.5		15.1	91.5	+35.2%
2011	9.4	0.3	1.4		11.1	67.6	+45.9%
2010	6.3	0.3	1.0		7.6	46.4	-9.1%
2009	7.5	0.5	0.4		8.4	51.0	+17.0%

	Physical	
	CD	Other physical
2013	1.3	0.2
2012	1.5	0.2
2011	1.3	0.1
2010	1.0	0.1
2009	1.2	0.4

SOUTH AFRICA



SOCIAL AND ECONOMIC INDICATORS

Population (millions): 48.6
 Language: English
 Currency: South African Rand (ZAR)
 US\$ exchange rate: 9.65
 GDP per capita (US\$): 11,500
 GDP % change: +2.0%
 Total music revenues per capita (US\$): 1.3

INDUSTRY INFORMATION

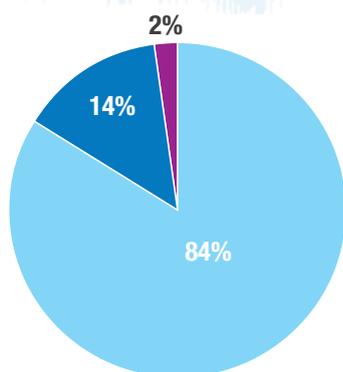
Performance rights music licensing company:
 SAMPRO / RISA www.risa.org.za
 Local music industry association:
 RISA www.risa.org.za

DIGITAL INDICATORS IN MILLIONS

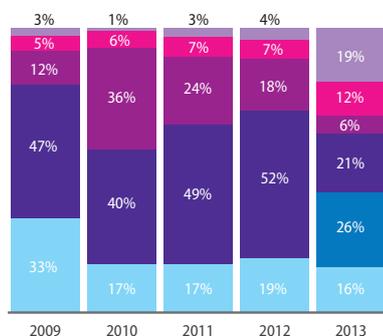
Internet users: 21.7
 Broadband households: 3
 Mobile subscriptions: 68.8
 Active smartphones: 4.5

WORLD RANKING

Physical: 17
 Digital: 33
 Synchronisation: 16
Total market: 26



RECORDED MUSIC SALES BY SECTOR 2013 (VALUE)
 Physical Digital Synch



DIGITAL SALES BY FORMAT (VALUE)
 Single track Full album Mobile Subscriptions Ad-supported Other

RECORDED MUSIC REVENUE (US\$ MILLIONS, TRADE VALUE)

	Physical	Digital	Performance rights	Synchronisation revenue	Total (US\$)	Total (ZAR)	Total % change
2013	52.7	8.8		1.4	63.0	607.6	-11.7%
2012	66.3	4.3		0.7	71.3	687.8	-6.9%
2011	71.5	4.3		0.8	76.6	739.0	-18.0%
2010	87.1	3.8	1.9	0.6	93.4	901.6	-7.6%
2009	95.6	3.5	2.1		101.2	976.3	-1.3%

RECORDED MUSIC SALES VOLUME (MILLION UNITS)

	Physical	
	CD	Other physical
2013	12.2	1.2
2012	15.9	1.7
2011	15.2	2.1
2010	16.0	3.1
2009	17.1	3.2

TOP SELLING SONGS 2013

	Artist	Title	Company
1	Trey Songz	Heart Attack	Warner
2	Bruno Mars	When I Was Your Man	Warner
3	Avicii	Wake Me Up!	Universal
4	Robin Thicke ft. T.I. + Pharrell	Blurred Lines	Universal
5	Katy Perry	Roar	Universal
6	Sean Paul	Got 2 Luv U	Warner
7	Bruno Mars	Just The Way You Are	Warner
8	DK Sippa	Feel Love	Warner
9	Miley Cyrus	Wrecking Ball	Sony
10	P!nk feat. Nate Ruess	Just Give Me A Reason	Sony

TOP INDEPENDENT LABELS (ALPHABETICAL ORDER)

Coleske
 David Gresham
 Just Music
 Select Musiek
 Soul Candi
 Spirit Music

TOP SELLING ALBUMS 2013

	Artist	Title	Company
1	Justin Bieber	Believe Acoustic	Universal
2	Various Artists	Now That's What I Call Music! 65	Universal
3	Joyous Celebration	Vol. 17 Grateful	Sony
4	Various Artists	Now That's What I Call Music! 64	Sony
5	Zahara	Phendula	Universal
6	Mafikizolo	Reunited	Universal
7	One Direction	Midnight Memories	Sony
8	Celine Dion	Loved Me Back To Life	Sony
9	P!nk	The Truth About Love	Sony
10	Manie Jackson	Tydlose Treffers	Sony

NOTES

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114 International Certification Award Levels	_____
118 Local Music Industry Associations	_____
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121 Digital Music Services Worldwide	_____

SOURCES & NOTES

SOURCES

- Population, language: World Factbook (www.cia.gov).
- GDP per capita (PPP): World Factbook (www.cia.gov).
- GDP % change: World Factbook (www.cia.gov).
- Currency, exchange rates: Oanda (www.oanda.com).
- Population by age group: World Factbook (www.cia.gov).
- Internet users: Screen Digest and IFPI National Groups.
- Broadband households: Screen Digest and IFPI National Groups. Figures refer to any household internet connection above 150Kbit/s. Broadband connections are fixed connections and do not include mobile phones, or WiFi hotspots. Technologies used include DSL, cable, FTTH and satellite.
- Mobile subscriptions: Screen Digest and IFPI National Groups. Figures refer to the total number of active mobile subscriptions.
- Active smartphones: Screen Digest and IFPI National Groups. Figures refer to the smartphone installed base.
- Active tablets: Screen Digest. Figures refer to the tablet installed base.
- National top selling songs and albums: Local chart compilers and IFPI National Groups.
- Top independent labels: IFPI National Groups.
- Digital volumes: IFPI National Groups and Nielsen
- IFPI Global Recording Artist Chart, top selling global albums and singles: record companies

NOTES

- **Trade value:** or wholesale value refers to record companies' revenue from the sale/licensing of recorded music products to domestic retailers/intermediaries, net of discounts, returns, handling charges and taxes. Premium sales (physical and digital) are included. Promotional goods, non-music/non-sound recording artist related income, deletions, cut-outs, distribution fees and income from legal settlements are excluded. All analysis, growth and trends, are based on trade values unless otherwise stated. Figures are provided by the record companies in the respective markets to the local IFPI. IFPI applies a 'coverage factor' to the figures to account for non-reporting companies, therefore representing 100% of the market.
- **US\$ values:** historical local currency values re-stated at the 2013 exchange rates. IFPI restates all historical local currency values on an annual basis. Market values can therefore vary retrospectively as a result of foreign currency movements.
- **Physical sales:** includes sales of all physical formats, including CD, vinyl, cassettes and other. CD sales ordered via the internet (e.g. Amazon) are reported as physical sales.
- **Digital sales:** includes permanent downloads, mobile products, subscription streams income, ad-supported streams income and other (e.g. income from cloud services). Excludes minimum guarantees (breakage).
- **Permanent downloads** (on the country pages referred to as "downloads"): digital products delivered online, via mobile network or kiosk and sold under a pay-per-transaction (or use of pre-pay). Includes audio single tracks, full albums and music videos.
- **Mobile products** (on the country pages referred to as "mobile"): includes master ringtones, ringback tones, and other personalised mobile products such as dedications and voicetones.
- **Subscription streams income:** digital content delivered online or via mobile network. Includes income from subscription services' free and premium tier, and income from bundled subscriptions.
- **Ad-supported streams income:** includes income from audio/video streams or tethered/temporary downloads monetised via ad-supported models. Includes income from video-on-demand services (e.g. YouTube, VEVO).
- **Performance rights revenues:** income received by record companies from music licensing companies for licences granted to third parties for the use of sound recordings and music videos in broadcasting (radio and TV), public performance (nightclubs, bars, restaurants, hotels) and certain internet uses. Performance rights revenues refer to distributions to record companies, excluding non-allocated distributions, and nonrecurring distributions. Distributions for the current year refer to monies collected by music licensing companies in the previous year (e.g. distributions for 2013 refer to monies collected in 2012 reaching the record company accounts in 2013). Figures are provided by the respective music licensing companies to IFPI.
- **Synchronisation revenues (synch):** flat fees or royalties from the use of sound recordings in TV, films, games and adverts. Gross income to the music company generated within the territory, irrespective of repertoire source.
- **Recorded music sales volume:** 'other physical' includes singles, vinyl, cassette, music video and other (e.g. mini disc and SACD).
- **Rounding:** figures are subject to rounding, which may affect overall totals and percentages.
- **Revisions and updates:** some figures presented in this publication may differ from previous years due to revisions and updates, or due to better information becoming available. Historical restatements have been made to exclude digital minimum guarantees (breakage).

IFPI figures may differ from local industry groups' reports due to IFPI's coverage adjustment.

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Produced and edited by Christina Boetner.

Text contribution by IFPI Global Insight & Communications teams,
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This report includes new findings from a consumer study in November 2013 carried out by Ipsos MediaCT across 10 countries, commissioned by IFPI.

For further information visit www.ifpi.org or follow us on Twitter @IFPI_org

For advertising opportunities in Recording Industry in Numbers 2015, please contact Laura Childs-Young (laura.childs-young@ifpi.org).

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US\$ EXCHANGE RATES 2013

COUNTRY	CURRENCY	EXCHANGE RATE
North America		
Canada	Canadian Dollar	1.03
USA	US Dollar	1.00
Europe		
Austria	Euro	0.75
Belgium	Euro	0.75
Bulgaria	Bulgarian Lev	1.48
Croatia	Croatian Kuna	5.72
Czech Republic	Czech Koruna	19.57
Denmark	Danish Krone	5.62
Finland	Euro	0.75
France	Euro	0.75
Greece	Euro	0.75
Germany	Euro	0.75
Hungary	Hungarian Forint	223.82
Ireland	Euro	0.75
Italy	Euro	0.75
Netherlands	Euro	0.75
Norway	Norwegian Kroner	5.88
Poland	Polish Zloty	3.16
Portugal	Euro	0.75
Russia	Russian Rouble	31.89
Slovakia	Euro	0.75
Spain	Euro	0.75
Sweden	Swedish Krona	6.52
Switzerland	Swiss Franc	0.93
UK	British Pound	0.64
Asia		
China	Chinese Yuan	6.20
Hong Kong	Hong Kong Dollar	7.76
India	Indian Rupee	58.59
Indonesia	Indonesian Rupiah	10,469.71
Japan	Japanese Yen	97.61
Malaysia	Malaysian Ringgit	3.16
Philippines	Philippine Peso	42.55
Singapore	Singapore Dollar	1.25
South Korea	South Korean Won	1,098.97
Taiwan	Taiwan Dollar	29.75
Thailand	Thai Baht	30.80
Latin America & Caribbean		
Argentina	Argentine Peso	5.48
Brazil	Brazilian Real	2.16
Central America & Caribbean	US Dollar	1.00
Chile	Chilean Peso	495.79
Colombia	Colombian Peso	1,871.10
Ecuador	Ecuadorian Sucre (ECS)	25,587.00
Mexico	Mexican Peso	12.76
Paraguay	Paraguay Guarani	4,409.69
Peru	Peruvian Nuevo Sol	2.75
Uruguay	Uruguayan Peso	20.83
Venezuela	Venezuelan Bolivar Fuerte	6.07
Australasia		
Australia	Australian Dollar	1.04
New Zealand	New Zealand Dollar	1.22
Africa		
South Africa	South African Rand	9.65

Source: Oanda. Rates are the average of the daily rates in calendar year 2013.

WORLD RANKING 2013

PHYSICAL		
Country	Rank	% of global revenues
Japan	1	31%
USA	2	17%
Germany	3	13%
France	4	8%
UK	5	7%
Canada	6	2%
Australia	7	2%
Italy	8	2%
Brazil	9	2%
Netherlands	10	1%
South Korea	11	1%
Austria	12	1%
Spain	13	<1%
Mexico	14	<1%
Switzerland	15	<1%
Belgium	16	<1%
South Africa	17	<1%
Poland	18	<1%
Argentina	19	<1%
Sweden	20	<1%
Finland	21	<1%
Turkey	22	<1%
Taiwan	23	<1%
India	24	<1%
Denmark	25	<1%
Hong Kong	26	<1%
Norway	27	<1%
New Zealand	28	<1%
Thailand	29	<1%
Russia	30	<1%
Indonesia	31	<1%
Ireland	32	<1%
Portugal	33	<1%
Venezuela	34	<1%
China	35	<1%
Chile	36	<1%
Czech Republic	37	<1%
Malaysia	38	<1%
Colombia	39	<1%
Hungary	40	<1%
Philippines	41	<1%
Greece	42	<1%
Singapore	43	<1%
Croatia	44	<1%
Iceland	45	<1%
Slovakia	46	<1%
Uruguay	47	<1%
Central America	48	<1%
Peru	49	<1%
Bulgaria	50	<1%
Ecuador	51	<1%
Paraguay	52	<1%

Source: IFPI.

DIGITAL		
Country	Rank	% of global revenues
USA	1	45%
UK	2	10%
Japan	3	8%
Germany	4	5%
Australia	5	4%
France	6	4%
Canada	7	4%
Sweden	8	2%
South Korea	9	2%
Norway	10	1%
Brazil	11	1%
Netherlands	12	1%
India	13	1%
China	14	1%
Italy	15	1%
Mexico	16	1%
Denmark	17	<1%
Spain	18	<1%
Switzerland	19	<1%
Russia	20	<1%
Thailand	21	<1%
Belgium	22	<1%
Austria	23	<1%
New Zealand	24	<1%
Ireland	25	<1%
Taiwan	26	<1%
Finland	27	<1%
Malaysia	28	<1%
Argentina	29	<1%
Hong Kong	30	<1%
Colombia	31	<1%
Poland	32	<1%
South Africa	33	<1%
Chile	34	<1%
Indonesia	35	<1%
Portugal	36	<1%
Philippines	37	<1%
Singapore	38	<1%
Central America	39	<1%
Greece	40	<1%
Czech Republic	41	<1%
Peru	42	<1%
Hungary	43	<1%
Venezuela	44	<1%
Slovakia	45	<1%
Ecuador	46	<1%
Croatia	47	<1%
Iceland	48	<1%
Bulgaria	49	<1%
Paraguay	50	<1%
Uruguay	51	<1%
Bolivia	52	<1%

Source: IFPI.

PERFORMANCE RIGHTS		
Country	Rank	% of global revenues
USA	1	24%
UK	2	12%
France	3	10%
Japan	4	8%
Germany	5	7%
Italy	6	3%
Spain	7	3%
Australia	8	3%
Netherlands	9	3%
Canada	10	3%
Brazil	11	2%
Belgium	12	2%
Sweden	13	1%
Austria	14	1%
Denmark	15	1%
Argentina	16	1%
Norway	17	1%
Malaysia	18	<1%
Israel	19	<1%
Finland	20	<1%
Switzerland	21	<1%
Russia	22	<1%
India	23	<1%
Czech Republic	24	<1%
New Zealand	25	<1%
Poland	26	<1%
Romania	27	<1%
Turkey	28	<1%
Portugal	29	<1%
Hungary	30	<1%
South Korea	31	<1%
Greece	32	<1%
Croatia	33	<1%
Chile	34	<1%
Slovakia	35	<1%
Taiwan	36	<1%
Singapore	37	<1%
Mexico	38	<1%
Venezuela	39	<1%
Colombia	40	<1%
Peru	41	<1%
Kazakhstan	42	<1%
Slovenia	43	<1%
Uruguay	44	<1%
Bulgaria	45	<1%
Thailand	46	<1%
Latvia	47	<1%
Lithuania	48	<1%
Central America	49	<1%
Paraguay	50	<1%
Estonia	51	<1%
Ukraine	52	<1%
Ecuador	53	<1%
Philippines	54	<1%

Source: IFPI.

SYNCHRONISATION		
Country	Rank	% of global revenues
USA	1	59%
UK	2	9%
Japan	3	8%
France	4	5%
Canada	5	3%
Australia	6	3%
Germany	7	2%
Italy	8	2%
Greece	9	1%
Russia	10	1%
India	11	<1%
Sweden	12	<1%
Brazil	13	<1%
Spain	14	<1%
Mexico	15	<1%
South Africa	16	<1%
Norway	17	<1%
Netherlands	18	<1%
Chile	19	<1%
Argentina	20	<1%
Austria	21	<1%
South Korea	22	<1%
Thailand	23	<1%
Belgium	24	<1%
Poland	25	<1%
China	26	<1%
New Zealand	27	<1%
Hong Kong	28	<1%
Switzerland	29	<1%
Finland	30	<1%
Singapore	31	<1%
Hungary	32	<1%
Colombia	33	<1%
Philippines	34	<1%
Peru	35	<1%
Bulgaria	36	<1%
Ireland	37	<1%
Malaysia	38	<1%
Croatia	39	<1%
Denmark	40	<1%
Central America	41	<1%
Slovakia	42	<1%
Ecuador	43	<1%
Czech Republic	44	<1%
Uruguay	45	<1%

Source: IFPI.

TOTAL MARKET		
Country	Rank	% of global revenues
USA	1	30%
Japan	2	20%
Germany	3	9%
UK	4	9%
France	5	6%
Australia	6	3%
Canada	7	3%
Italy	8	2%
Brazil	9	2%
South Korea	10	1%
Netherlands	11	1%
Sweden	12	1%
Spain	13	1%
Mexico	14	<1%
Norway	15	<1%
Austria	16	<1%
Switzerland	17	<1%
Belgium	18	<1%
India	19	<1%
Denmark	20	<1%
China	21	<1%
Argentina	22	<1%
Russia	23	<1%
Poland	24	<1%
Finland	25	<1%
South Africa	26	<1%
Taiwan	27	<1%
Thailand	28	<1%
New Zealand	29	<1%
Turkey	30	<1%
Ireland	31	<1%
Hong Kong	32	<1%
Malaysia	33	<1%
Portugal	34	<1%
Indonesia	35	<1%
Chile	36	<1%
Czech Republic	37	<1%
Colombia	38	<1%
Venezuela	39	<1%
Greece	40	<1%
Hungary	41	<1%
Philippines	42	<1%
Singapore	43	<1%
Israel	44	<1%
Croatia	45	<1%
Central America	46	<1%
Slovakia	47	<1%
Peru	48	<1%
Romania	49	<1%
Uruguay	50	<1%
Iceland	51	<1%
Bulgaria	52	<1%
Kazakhstan	53	<1%
Ecuador	54	<1%
Slovenia	55	<1%
Paraguay	56	<1%
Latvia	57	<1%
Lithuania	58	<1%
Estonia	59	<1%
Ukraine	60	<1%
Bolivia	61	<1%

Source: IFPI.

POPULATION BY AGE GROUP

COUNTRY	AGE 0-14	AGE 15-24	AGE 25-54	AGE 55-64	AGE 65+
North America					
Canada	16%	13%	41%	13%	17%
USA	20%	14%	40%	12%	14%
Europe					
Austria	14%	12%	43%	12%	19%
Belgium	16%	12%	40%	13%	19%
Bulgaria	14%	11%	42%	14%	19%
Croatia	15%	12%	41%	15%	17%
Czech Republic	14%	11%	44%	14%	18%
Denmark	17%	13%	40%	12%	18%
Finland	16%	12%	38%	15%	19%
France	19%	12%	39%	12%	18%
Germany	13%	11%	42%	13%	21%
Greece	14%	10%	43%	13%	20%
Hungary	15%	12%	42%	14%	17%
Ireland	22%	12%	44%	10%	12%
Italy	14%	10%	43%	12%	21%
Netherlands	17%	12%	41%	13%	17%
Norway	18%	13%	40%	12%	17%
Poland	15%	12%	44%	15%	14%
Portugal	16%	11%	42%	12%	19%
Russia	16%	11%	46%	13%	13%
Slovakia	16%	13%	45%	13%	13%
Spain	15%	10%	46%	11%	18%
Sweden	15%	13%	39%	12%	21%
Switzerland	15%	12%	44%	12%	17%
UK	17%	13%	41%	12%	17%
Asia					
China	17%	16%	47%	11%	9%
Hong Kong	11%	11%	48%	15%	15%
India	29%	18%	40%	7%	6%
Indonesia	27%	17%	42%	8%	6%
Japan	13%	10%	38%	14%	25%
Malaysia	29%	17%	41%	8%	5%
Philippines	34%	19%	37%	6%	4%
Singapore	14%	18%	50%	10%	8%
South Korea	15%	13%	48%	12%	12%
Taiwan	14%	14%	48%	13%	11%
Thailand	19%	15%	46%	10%	10%
Latin America & Caribbean					
Argentina	25%	16%	39%	9%	11%
Brazil	24%	17%	44%	8%	7%
Central America & Caribbean	31%	20%	37%	6%	6%
Chile	21%	16%	43%	10%	10%
Colombia	26%	18%	42%	8%	6%
Ecuador	29%	19%	39%	7%	6%
Mexico	27%	18%	41%	7%	7%
Paraguay	27%	21%	39%	7%	6%
Peru	28%	19%	39%	7%	7%
Uruguay	21%	16%	39%	10%	14%
Venezuela	29%	19%	39%	7%	6%
Australasia					
Australia	18%	13%	42%	12%	15%
New Zealand	20%	14%	41%	11%	14%
Africa					
South Africa	28%	21%	38%	7%	6%

Source: CIA, The World Factbook 2014 (data available as of March 2014).

GDP PER CAPITA 2013

Figures in US\$. GDP measured at purchasing power parity (PPP).

COUNTRY	GDP (IN BILLIONS)	GDP GROWTH	GDP PER CAPITA
North America			
Canada	1,518	+1.6%	43,100
USA	16,720	+1.6%	52,800
Europe			
Austria	361	+0.4%	42,600
Belgium	422	+0.1%	37,800
Bulgaria	105	+0.5%	14,400
Croatia	78	-0.6%	17,800
Czech Republic	287	-0.4%	27,200
Denmark	211	+0.1%	37,800
Finland	196	-0.6%	35,900
France	2,273	+0.2%	35,700
Germany	3,227	+0.5%	39,500
Greece	266	-4.2%	23,600
Hungary	197	+0.2%	19,800
Ireland	190	+0.6%	41,300
Italy	1,805	-1.8%	29,600
Netherlands	696	-1.3%	41,400
Norway	282	+1.6%	55,400
Poland	814	+1.3%	21,100
Portugal	243	-1.8%	22,900
Russia	2,553	+1.3%	18,100
Slovakia	133	+0.8%	24,700
Spain	1,389	-1.3%	30,100
Sweden	394	+0.9%	40,900
Switzerland	370	+1.7%	46,000
UK	2,378	+1.4%	37,300
Asia			
China	13,370	+7.6%	9,800
Hong Kong	382	+3.0%	52,700
India	4,962	+3.8%	4,000
Indonesia	1,285	+5.3%	5,200
Japan	4,729	+2.0%	37,100
Malaysia	525	+4.7%	17,500
Philippines	454	+6.8%	4,700
Singapore	339	+2.5%	68,541
South Korea	1,666	+2.8%	33,200
Taiwan	926	+2.2%	39,600
Thailand	674	+3.1%	9,900
Latin America & Caribbean			
Argentina	771	+3.5%	18,600
Brazil	2,422	+2.5%	12,100
Central America & Caribbean	385	+2.6%	9,123
Chile	335	+4.4%	19,100
Colombia	527	+4.2%	11,100
Ecuador	158	+4.0%	10,600
Mexico	1,845	+1.2%	15,600
Paraguay	46	+12.0%	6,800
Peru	344	+5.1%	11,100
Uruguay	56	+3.5%	16,600
Venezuela	407	+1.6%	13,600
Australasia			
Australia	998	+2.5%	43,000
New Zealand	136	+2.5%	30,400
Africa			
South Africa	596	+2.0%	11,500

Source: CIA, The World Factbook.

RECORDED MUSIC REVENUE PER CAPITA 2013

COUNTRY	TOTAL MUSIC MARKET (US\$ M)	POPULATION (M)	MUSIC REVENUE PER CAPITA (US\$)
North America			
Canada	424.1	34.6	12.3
USA	4,473.5	316.4	14.1
Europe			
Austria	119.7	8.2	14.6
Belgium	114.1	10.4	11.0
Bulgaria	2.5	7.0	0.4
Croatia	8.7	4.5	1.9
Czech Republic	21.9	10.5	2.1
Denmark	95.0	5.6	17.0
Finland	67.9	5.3	12.9
France	956.2	66.0	14.5
Germany	1,365.1	81.1	16.8
Greece	17.3	10.7	1.6
Hungary	15.7	9.9	1.6
Ireland	45.7	4.8	9.5
Italy	238.8	61.5	3.9
Netherlands	205.6	16.8	12.2
Norway	120.0	5.1	23.5
Poland	69.1	38.4	1.8
Portugal	28.5	10.8	2.6
Russia	69.4	142.4	0.5
Slovakia	7.1	5.5	1.3
Spain	150.7	47.4	3.2
Sweden	194.2	9.6	20.2
Switzerland	115.6	8.0	14.5
UK	1,303.5	63.4	20.6
Asia			
China	82.6	1,355.7	0.1
Hong Kong	38.7	7.1	5.5
India	113.3	1,220.8	0.1
Indonesia	25.7	251.2	0.1
Japan	3,012.0	127.3	23.7
Malaysia	35.5	29.6	1.2
Philippines	13.8	105.7	0.1
Singapore	13.1	5.4	2.4
South Korea	211.3	49.0	4.3
Taiwan	58.9	23.3	2.5
Thailand	58.0	67.5	0.9
Latin America & Caribbean			
Argentina	70.2	42.6	1.6
Brazil	227.9	201.0	1.1
Central America & Caribbean	8.4	42.2	0.2
Chile	24.0	17.2	1.4
Colombia	21.5	45.7	0.5
Ecuador	1.8	15.4	0.1
Mexico	135.4	118.8	1.1
Paraguay	0.9	6.6	0.1
Peru	6.4	29.8	0.2
Uruguay	4.4	3.3	1.3
Venezuela	20.1	28.5	0.7
Australasia			
Australia	430.8	22.3	19.3
New Zealand	52.4	4.4	11.9
Africa			
South Africa	63.0	48.6	1.3

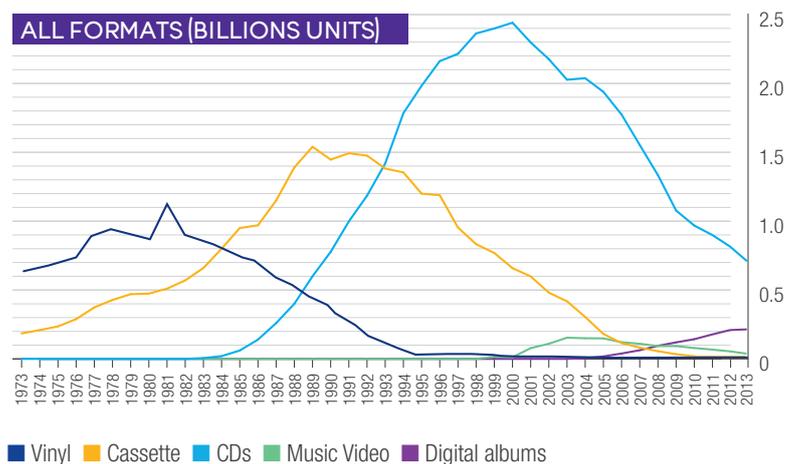
Source: The World Factbook and IFPI.

RECORDED MUSIC VOLUME TREND 1973-2013

Figures in millions.

	FULL-LENGTH FORMATS							SINGLES	TOTAL UNITS
	Vinyl	Cassette	CD	Music video	Other physical	Digital albums	Total albums		
2013	16	2	719	53	9	215	1,012	2,198	3,211
2012	12	2	819	66	7	211	1,117	2,357	3,474
2011	9	5	913	71	6	182	1,186	2,199	3,385
2010	6	10	970	79	2	145	1,212	1,943	3,155
2009	6	34	1,084	94	2	120	1,340	1,872	3,212
2008	5	56	1,342	93	2	97	1,595	1,671	3,266
2007	6	82	1,561	111	4	67	1,831	1,157	2,988
2006	3	115	1,773	121	3	40	2,055	796	2,852
2005	4	181	1,939	149	10	19	2,301	456	2,757
2004	7	304	2,038	150	13	6	2,517	346	2,863
2003	6	418	2,027	154	5		2,611	233	2,843
2002	8	481	2,176	110	1		2,775	265	3,040
2001	10	599	2,298	78	1		2,986	318	3,303
2000	12	659	2,441	12	1		3,124	370	3,494
1999	14	769	2,399	16	1		3,199	439	3,638
1998	22	833	2,363				3,218	458	3,676
1997	17	954	2,215				3,186	516	3,702
1996	21	1,188	2,162				3,372	466	3,838
1995	33	1,200	1,983				3,216	432	3,648
1994	49	1,354	1,784				3,188	390	3,578
1993	109	1,382	1,419				2,909	410	3,319
1992	175	1,476	1,185				2,836	352	3,188
1991	292	1,493	998				2,782	334	3,116
1990	339	1,447	777				2,564	344	2,908
1989	450	1,540	600				2,590	357	2,947
1988	510	1,390	400				2,300	370	2,670
1987	590	1,150	260				2,000	390	2,390
1986	690	970	140				1,800	490	2,290
1985	730	950	61				1,741	650	2,391
1984	800	800	20				1,620	750	2,370
1983	850	660	6				1,516	800	2,316
1982	900	570					1,470	680	2,150
1981	1,140	510					1,650	550	2,200
1980	878	474					1,352	526	1,878
1979	896	470					1,365	624	1,990
1978	942	428					1,370	600	1,971
1977	898	374					1,272	545	1,817
1976	743	289					1,032	516	1,548
1975	674	236					910	483	1,393
1974	655	209					864	515	1,379
1973	617	185					802	530	1,331

Source: IFPI.



Notes

- Other includes SACD and DVD-A and other.
- Singles include physical singles and single track downloads.

INTERNATIONAL CERTIFICATION AWARD LEVELS

ALBUMS – CERTIFICATION BASIS

Albums can be certified on basis of either:

Full units: sales of physical or digital albums count towards the award level.

Track equivalent: sales of tracks from an album count towards the album award level.

Revenue: set levels of revenue generated by an album counts towards the award level.

The list below shows which system operates in different countries:

FULL UNITS	TRACK EQUIVALENT	REVENUE
Argentina	Hungary 10 digital tracks from same album = 1 album.	Thailand THB \$85 in digital sales from same album = 1 album. Includes revenue from ringtones and ringback tones only (downloads and streams not included). THB \$850,000 = Gold (domestic) and THB \$1.7 m = Platinum (domestic).
Australia		Singapore Physical and digital albums are certified separately. Physical albums are certified on a full units basis. Digital album awards calculated as US\$10 from same album = 1 album. The Gold level is US\$50,000 and Platinum is US\$100,000.
Austria	Poland 10 digital tracks from same album = 1 album. Digital tracks include single downloads, master ringtones and ringback tones (all counted equally). Streams are not included.	South Korea KRW \$70m in total revenues from an album (physical + digital) = Gold and KRW \$140m in total revenues (physical + digital) = Platinum.
Belgium		Taiwan Gold and Platinum awards may be applied for on either a full units basis or a revenue basis.
Brazil		
Canada		
Chile		
China		
Colombia		
Croatia	Sweden 10 single track downloads from same album = 1 album / 1,300 streams = 1 album / 1 download bundle = 1 album.	
Czech Republic		
Denmark		
Finland		
France	India 25 ringback tones from same album = 1 album / 10 single track downloads = 1 album.	
Germany		
Greece		
Ireland		
Italy	Philippines Units-based award for physical albums and a 'combined sales' award which incorporates physical and digital. 'Combined award' includes all digital formats except ringtones. Equivalent are calculated as: 10 downloads = 1 album / 20 ringback tones / truetones = 1 album / 2 ringback tones / truetones = 1 full track download / 2 special premium sales = 1 album (must have minimum of 5 audio tracks) / 5 video tracks = 1 album (live concerts are excluded) / 10 music video downloads = 1 album.	
Japan		
Malaysia		
Mexico		
Netherlands		
New Zealand		
Norway		
Paraguay		
Singapore		
Slovakia		
Spain		
Switzerland		
Turkey		
UK		
Uruguay		
USA	South Africa 30 mastertones or ringback tones = 1 album; 10 full track downloads = 1 album.	

Notes

Argentina: Separate levels for digital albums. Please contact the local industry association for further information.

Belgium: Domestic repertoire is divided into non-Dutch/French repertoire & French/Dutch repertoire - award levels vary; different levels for classical and jazz repertoire. Please contact the local industry association for further information.

Croatia: Also operates Silver award level (3,500).

Germany: Jazz repertoire levels are 10,000 for Gold & 20,000 for Platinum.

Hong Kong : for details of award levels please contact asia@ifpi.org.

Hungary: Classical/jazz/world music/proze levels are 1,500 for Gold (domestic); 1000 for Gold (international); 3,000 for Platinum (domestic) & 2,000 for Platinum (international).

Indonesia: Separate levels for digital albums. Please contact the local industry association for further information.

Japan: Physical and digital albums certified separately.

Netherlands: Classical, jazz and world levels are 10,000 for Gold & 20,000 for Platinum.

Poland: Levels shown refer to pop/rock/MOR. Varying levels for other genres. Contact the local industry association for further details.

Switzerland : French and Italian repertoire levels are 7,500 for Gold & 15,000 for Platinum.

UK: Also operates a Silver award (60,000).

USA: Latin repertoire levels are 30,000 for Gold; 60,000 for Platinum & 120,000 for Multi-Platinum.

ALBUM CERTIFICATION LEVELS						
	Domestic Repertoire			International Repertoire		
	Gold	Platinum	Diamond	Gold	Platinum	Diamond
North America						
Canada	40,000	80,000	800,000	40,000	80,000	800,000
USA	500,000	1,000,000	10,000,000	500,000	1,000,000	10,000,000
Europe						
Austria	7,500	15,000		7,500	15,000	
Belgium	10,000	20,000		15,000	30,000	
Croatia	7,000	15,000	30,000	7,000	15,000	30,000
Czech Republic	3,000	6,000		1,500	3,000	
Denmark	10,000	20,000		10,000	20,000	
Finland	10,000	20,000		10,000	20,000	
France	50,000	100,000	500,000	50,000	100,000	500,000
Germany	100,000	200,000		100,000	200,000	
Greece	6,000	12,000		3,000	6,000	
Hungary	2,000	4,000		1,000	2,000	
Iceland	5,000	10,000		5,000	10,000	
Ireland	7,500	15,000		7,500	15,000	
Italy	25,000	50,000	500,000	25,000	50,000	500,000
Netherlands	25,000	50,000		25,000	50,000	
Norway	15,000	30,000		15,000	30,000	
Poland	15,000	30,000	150,000	10,000	20,000	100,000
Portugal	7,500	15,000		7,500	15,000	
Slovakia	1,500	3,000		750	1,500	
Spain	20,000	40,000		20,000	40,000	
Sweden	20,000	40,000		20,000	40,000	
Switzerland	10,000	20,000		10,000	20,000	
UK	100,000	300,000		100,000	300,000	
Asia						
China	20,000	40,000		10,000	20,000	
India	100,000	200,000		4,000	6,000	
Indonesia	35,000	75,000		5,000	10,000	
Japan	100,000	250,000	1,000,000	100,000	250,000	1,000,000
Malaysia	5,000	10,000		5,000	10,000	
Philippines	7,500	15,000	150,000	7,500	15,000	150,000
Singapore	5,000	10,000		5,000	10,000	
South Korea	5,000	10,000		5,000	10,000	
Taiwan	15,000	30,000		5,000	10,000	
Thailand	10,000	20,000		5,000	10,000	
Australasia						
Australia	35,000	70,000		35,000	70,000	
New Zealand	7,500	15,000		7,500	15,000	
Latin America						
Argentina	15,000	30,000	200,000	15,000	30,000	200,000
Brazil	40,000	80,000	300,000	20,000	40,000	160,000
Chile	7,500	15,000		7,500	15,000	
Colombia	10,000	20,000		5,000	10,000	
Ecuador	3,000	6,000		3,000	6,000	
Mexico	30,000	60,000	300,000	30,000	60,000	300,000
Paraguay	5,000	10,000		5,000	10,000	
Peru	3,000	6,000		3,000	6,000	
Uruguay	2,000	4,000		2,000	4,000	
Venezuela	5,000	10,000		5,000	10,000	
Africa						
South Africa	20,000	40,000		20,000	40,000	

SINGLES – CERTIFICATION BASIS

The following countries include single track downloads and physical singles in their singles awards:

- Austria
- Belgium
- Canada
- Chile
- Denmark*
- France
- Germany
- Greece
- Hungary
- Ireland
- Italy
- Netherlands
- New Zealand
- Paraguay
- South Africa
- Switzerland
- UK

The following countries include additional formats in the singles award category:

Argentina: Preloaded tracks

Australia: “Singles & Track Chart” eligible bundles containing the lead track are eligible to be aggregated (operates as per the Chart rules). Streams excluded.

Japan: Physical and digital singles are certified separately. Separate digital awards in the following categories: 1) ringtones; 2) single tracks.

Malaysia: Each ringback tone subscription is counted as a single for Gold/Platinum certifications. Each later renewal of subscriptions is also treated as a single. Streams excluded.

Mexico: All digital formats included (counted equally), except streams.

Norway: Streams included, calculated as 163 streams = 1 download.

Poland: Master ringtones and ringback tones included (counted equally with downloads). Streams excluded.

Singapore: Physical and digital singles certified separately. For the digital award all digital formats are included including single track downloads, ringback tones and streams (revenue basis certification).

Spain: Realtones and ringback tones included (counted equally with downloads).

Taiwan: Hybrid certification as per albums.

USA: On-demand audio streams and video song streams, calculated as 100 streams = 1 download

Notes

Belgium: Levels shown refer to domestic repertoire. Levels for international repertoire are 15,000 for Gold & 30,000 for Platinum.

Brazil: Levels shown refer to domestic repertoire. For international repertoire the levels are 30,000 for Gold; 60,000 for Platinum and 250,000 for Diamond.

Canada: Levels shown refer to digital singles. For physical sales the levels are 5,000 for Gold; 10,000 for Platinum & 100,000 for Diamond.

Denmark*: Operates separate award level for streaming: Gold 900,000 & Platinum 1,800,000.

Hungary: Levels shown refer to domestic repertoire. For international repertoire levels are 1,000 for Gold & 2,000 for Platinum.

Japan: Highest level is called ‘Million’ Award.

Mexico: Includes sales of versions in different languages, genres, acoustic versions, live and collaborations with other artists.

USA: Latin repertoire levels are 30,000 for Gold; 60,000 for Platinum & 120,000 for Multi-Platinum

SINGLES CERTIFICATION LEVELS			
	Gold	Platinum	Diamond / Multi-Platinum
North America			
Canada	40,000	80,000	800,000
USA	500,000	1,000,000	2,000,000
Europe			
Austria	15,000	30,000	
Belgium	10,000	20,000	
Denmark	15,000	30,000	
Finland	5,000	10,000	
France	75,000	150,000	250,000
Germany	150,000	300,000	
Greece	3,000	6,000	
Hungary	1,500	3,000	
Ireland	7,500	15,000	
Italy	15,000	30,000	300,000
Netherlands	10,000	20,000	
Norway	5,000	10,000	
Poland	10,000	20,000	100,000
Portugal	10,000	20,000	
Spain	20,000	40,000	
Sweden	20,000	40,000	
Switzerland	15,000	30,000	
UK	400,000	600,000	
Asia			
Japan	100,000	250,000	1,000,000
Philippines	75,000	150,000	
Singapore	5,000	10,000	
Taiwan	5,000	10,000	
Australasia			
Australia	35,000	70,000	
New Zealand	5,000	10,000	
Latin America			
Argentina	7,500	15,000	
Brazil	50,000	100,000	500,000
Mexico	30,000	60,000	300,000
Africa			
South Africa	10,000	25,000	50,000
Egypt	20,000	40,000	

Source: IFPI National Groups

MUSIC VIDEOS – AWARDS BASIS

The following countries include only physical video products (DVD and other physical formats e.g. Blu-Ray, VHS) in this category:

- Argentina
- Austria
- Belgium
- Brazil
- Canada
- Chile
- Colombia
- Croatia
- Czech Republic
- Denmark
- Finland
- Greece
- Hungary
- Ireland
- Japan
- Mexico
- Netherlands
- New Zealand
- Norway
- Poland
- Slovakia
- South Africa
- Spain
- Sweden
- Switzerland
- UK
- Uruguay
- USA

The following markets include additional formats in the 'videos' award category:

France: EPs are included.

Germany: digital sales also included (long form only).

Australia: digital bundles of videos of the tracks also included (counted equally with DVDs).

MUSIC VIDEO CERTIFICATION LEVELS			
	Gold	Platinum	Diamond
North America			
Canada	5,000	10,000	100,000
USA	50,000	100,000	
Europe			
Austria	5,000	10,000	
Belgium	25,000	50,000	
Czech Republic	1,500	3,000	
Denmark	7,500	15,000	
Finland	5,000	10,000	
France	7,500	15,000	60,000
Germany	25,000	50,000	
Greece	3,000	6,000	
Hungary	2,000	4,000	
Iceland	5,000	10,000	
Ireland	2,000	4,000	
Netherlands	25,000	50,000	
Norway	5,000	10,000	
Poland	5,000	10,000	
Portugal	4,000	8,000	
Slovakia	750	1,500	
Spain	10,000	25,000	
Sweden	5,000	10,000	
UK	25,000	50,000	
Asia			
Japan	100,000	250,000	1,000,000
Philippines	7,500	15,000	
Australasia			
Australia	7,500	15,000	
New Zealand	2,500	5,000	
Latin America			
Argentina	7,500	15,000	75,000
Brazil	25,000	50,000	250,000
Chile	2,500	5,000	
Colombia	5,000	10,000	
Mexico	10,000	20,000	
Uruguay	1,000	2,000	
Africa			
South Africa	5,000	10,000	

Source: IFPI National Groups

Notes

Brazil: Figures shown are for domestic repertoire. For international repertoire the levels are 15,000 for Gold; 30,000 for Platinum and 125,000 for Diamond.

Czech Republic: figures shown are for domestic repertoire. For international repertoire levels are 750 for Gold & 1,500 for Platinum.

Slovakia: Figures shown are for domestic repertoire. For international repertoire levels are 375 for Gold & 750 for Platinum.

LOCAL MUSIC INDUSTRY ASSOCIATIONS

For the latest information please see www.ifpi.org

NORTH AMERICA

Canada

Music Canada
85 Mowat Avenue
Toronto ON M6K 3E3
Tel: +1 (416) 967 7272
Fax: +1 (416) 967 9415
info@musiccanada.com
www.musiccanada.com

USA

Recording Industry Association
of America Inc. (RIAA)
1025 F Street, NW, 10th Floor
Washington, D.C. 20004
Tel: +1 202 775 0101
Fax: +1 202 775 7253
www.riaa.com

EUROPE

I FPI European Office

Square de Meeûs 40
1000 Brussels, Belgium
Tel: +32 (0)2 511 9208
Fax: +32 (0)2 502 3077
Email: euroinfo@ifpi.org

Austria

IFPI Austria – Verband der
Österreichischen Musikwirtschaft
Seilerstätte 18-20 / Mezzanin
A-1010 Vienna
Tel: +43 1 535 6035
Fax: +43 1 535 5191
office@ifpi.at
www.ifpi.at

Belgium

BEA Music c/o Belgian Entertainment
Association (BEA)
Place de l'Alma 3 Bte 2
1200 Brussels
Tel: +32 2 779 4174
Fax: +32 2 779 1669
bea@belgianentertainment.be
www.belgianentertainment.be

Bulgaria

Bulgarian Association of
Music Producers (BAMP)
77 Tsar Asen Str.
1463 Sofia
Tel: +359 2 963 2757
Fax: +359 2 866 0104
office@bamp-bg.org
www.bamp-bg.org

Croatia

Croatian Phonographic
Association – IFPI Croatia (HDU)
Ulica kneza Borne 5
10 000 Zagreb
Tel: +385 1 3668 194 /5
Fax: +385 1 3668 072
hdu@hdu.hr
www.hdu.hr

Czech Republic

IFPI Czech Republic
Slavíkova 15
Prague 2, 120 00
Tel: +420 222 769 772
ifpicr@ifpicr.cz
www.ifpicr.cz

Denmark

IFPI Denmark
Magstræde 10A, 2.sal
1204 København K
Denmark Tel: +45 32 71 20 80
ifpi@ifpi.dk
www.ifpi.dk

Finland

IFPI Finland
Yrjonkatu 3B
00120 Helsinki
Tel: +358 9 6803 4050
Fax: +358 9 6803 4055
ifpi@ifpi.fi
www.ifpi.fi

France

Syndicat National de l'Edition
Phonographique (SNEP)
14 boulevard du Général Leclerc
92200 Neuilly sur Seine cedex
Tel: +33 1 47 38 04 04
Fax: +33 1 5376 0733
valerie.dete@snepmusique.com
www.snepmusique.com

Germany

Bundesverband Musikindustrie e.V.
Reinhardtstraße 29
D-10117 Berlin
Tel: +49 30 590 0380
Fax: +49 30 590 03838
info@musikindustrie.de
www.musikindustrie.de

Greece

Association of Greek
Producers of Phonograms
231 Mesogeion Ave.
N.Psychico 15451
Tel: +30 210 685 1739
info@ifpi.gr
www.ifpi.gr

Hungary

Magyar Hangfelvételkiadók
Szövetsége (MAHASZ)
Harcos tér 5
Budapest, 1113
Tel: +36 1 391 4200
Fax: +36 1 200 2679
info@mahasz.hu
www.mahasz.hu

Ireland

Irish Recorded Music
Association (IRMA)
IRMA House
1 Corrig Avenue Dun Laoghaire
Co.Dublin
Tel: +353 1 280 6571
Fax: +353 1 280 6579
irma_info@irma.ie
www.irma.ie

Italy

Federazione Industria Musicale
Italiana (FIMI)
Via Leone XIII, n° 14
20145 Milan
Tel: +390 2 795 879
Fax: +390 2 799 673
info@fimi.it
www.fimi.it

Netherlands

NVPI, branchevereniging van de
entertainmentindustrie
Albertus Perkstraat 36
1217 NT Hilversum
Tel: +31 35 625 4411
Fax: +31 35 625 4410
info@nvpi.nl
www.nvpi.nl

Norway

IFPI Norway
Kr Augustsgt 10
0164 Oslo
Tel: +47 22 99 31 00
Fax: +47 22 99 31 01
ifpi@ifpi.no
www.ifpi.no

Poland

Związek Producentów Audio Video
(ZPAV)
12/2 Kruczkowskiego Street
00-380 Warsaw
Tel: +48 22 625 69 66
Fax: +48 22 625 16 61
biuro@zpav.pl
www.zpav.pl

Portugal

Associação Fonográfica Portuguesa
(AFP) Av. Sidónio Pais
20 – R/C DTº
1050-215 Lisbon
Tel: +351 21 3 156 655
Fax: +351 21 3 156 683
geral@afp.org.pt
www.afp.org.pt

Slovakia

See details for Czech Republic

Spain

Productores de Musica de España
(Promusicae)
C/Maria de Molina
39-6ª Planta
28006 Madrid
Tel: +34 91 417 04 70
Fax: +34 91 556 92 72
promusicae@promusicae.es
www.promusicae.es

Sweden

IFPI Sverige (IFPI Sweden)
Tegnérsgatan 34
113 59 Stockholm
Tel: +46 8 735 9750
Fax: +46 8 273 745
info@ifpi.se
www.ifpi.se

Switzerland

IFPI Schweiz (Schweizer
Landesgruppe der IFPI)
Berninastrasse 53
CH-8057 Zurich
Tel: +41 43 343 93 30
Fax: +41 43 343 93 40
info@ifpi.ch
www.ifpi.ch

United Kingdom

BPI (British Recorded
Music Industry) Ltd
Riverside Building, County Hall
Westminster Bridge Road
London SE1 7JA
Tel: +44 (0)20 7803 1300
Fax: +44 (0)20 7803 1310
www.bpi.co.uk

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22/F Shanghai Industrial
Investment Building
48-62 Hennessy Road
Wanchai
Hong Kong
Tel: +852 2 866 6862
Fax: +852 2865 6326
asia@ifpi.org

Hong Kong

Hong Kong Recording Industry
Alliance (HKRIA)
22/F Shanghai Industrial Investment
Building, 48-62 Hennessy Road
Wanchai, Hong Kong SAR
Tel: +852 2520 7000
Fax: +852 2882 6897
general@hkria.com
www.hkria.com

IFPI (Hong Kong Group) Ltd.
Unit 18A Tower A, Billion Centre No.
1 Wang Kwong Road, Kowloon Bay,
Kowloon
Tel: +852 2861 4318
Fax: +852 2866 6859
enquiry@ifpihk.org
www.ifpihk.org

India

The Indian Music Industry (IMI)
Crescent Towers, 7th Floor,
B-68, Veera Estate,
Off New Link Road, Andheri (W),
Mumbai – 400 053
Tel: +91 22 26736301/02/03
Fax: +91 22 26736304
www.indianmi.org

Indonesia

The Sound Recording Association
of Indonesia (ASIRI)
Dea Tower I
Mezzanine Floor Suite MZ-01
Mega Kuningan
Mega Kuningan Barat Kav. E.4.3
No. 1-2
South Jakarta 12950
Tel: +62 21 5762648
Fax: +62 21 5762649
info@asiri.or.id
www.asiri.or.id

Japan

Recording Industry Association
of Japan (RIAJ)
9F Kyodo Tsushin Building
2-2-5 Toranomom
Minato-ku
Tokyo 105-0001
Tel: +81 3 5575-1301
info@riaj.or.jp
www.riaj.or.jp

Malaysia

Recording Industry Association of
Malaysia (RIM)
L-8-2, 8th Floor, Block L No.2, Jalan
Solaris Solaris Mont' Kiara
50480 Kuala Lumpur
Tel: +603 6207 2800
Fax: +603 6207 2900
info@rim.org.my
www.rim.org.my

Singapore

Recording Industry Association
Singapore (RIAS)
4 Leng Kee Road
#03-07 SiS Building
Singapore
159088
Tel: +65 6220 4166
Fax: +65 6220 9452
info@rias.org.sg
www.rias.org.sg

Taiwan

Recording Industry Foundation
in Taiwan (RIT)
4F, No.85, Sec. 4, Bade Road
Sungshan Chiu
105 Taipei
Tel: +886 2 2718 8818
Fax: +886 2 2528 1998
info@rit.org.tw
www.rit.org.tw

Thailand

Thai Entertainment Content Trade
Association (TECA)
23/17-18 Soi Soonvijai, Rama 9
Road
Bangkapi Sub-District
Huay-Kwang District
10320 Bangkok
Tel: +662 203 1002/3
Fax: +662 203 1010
ifpithai@teca.co.th
www.teca.co.th

AUSTRALASIA**Australia**

Australian Recording Industry
Association (ARIA)
Level 4, 11-17 Buckingham Street
Surry Hills NSW 2010
Tel: +61 2 8569 1144
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aria.mail@aria.com.au
www.aria.com.au

New Zealand

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Private Bag 78 850
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Argentina

Cámara Argentina de Productores de
Fonogramas y Videogramas (CAPIF)
Avenida de Mayo 650
Piso 4°
C1084AA0
Buenos Aires
Tel: +54 11 4342 7249
Fax: +54 11 4342 7249
capif@capif.org.ar
www.capif.org.ar

Brazil

Associação Brasileira dos Produtores
de Discos (ABPD)
Rua Visconde de Pirajá, 595 Sala 407
Ipanema
Cep. 22410-003 Rio de Janeiro
Tel: +55 21 3511 9908
Fax: +55 21 3511 9907
Email: abpd@abpd.org.br
www.abpd.org.br

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Santiago
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Fax: +56 2 434 0015
www.ifpichile.cl

Colombia

APDIF Colombia
Carrera 14,
No. 94 A – 10 – Oficina 402
Bogota
Tel: +57 1 812 8662
www.apdifcolombia.com

Mexico

Asociación Mexicana de Productores
de Fonogramas y Videogramas
A.C. (Amprofon)
Lafontaine 42
Col. Polanco Chapultepec
C.P.11560
Mexico D.F.
Tel: +52 5281 6035
amprofon@amprofon.com.mx
www.amprofon.com.mx

AFRICA**South Africa**

The Recording Industry of
South Africa (RISA)
P O Box 367
Randburg
2194
Tel: +27 11 886 1342
Fax: +27 11 886 4169
david@risa.org.za
www.risa.org.za

SALES TAX ON SOUND RECORDINGS

NORTH AMERICA	SALES TAX
Canada	5%
USA	0% – 10.25%

EUROPE	SALES TAX
Austria	20%
Belgium	21%
Bulgaria	20%
Croatia	25%
Czech Republic	21%
Denmark	25%
Finland	23%
France	20%
Germany	19%
Greece	23%
Hungary	27%
Ireland	23%
Italy	22%
Netherlands	21%
Norway	25%
Poland	23%
Portugal	23%
Slovakia	20%
Spain	21%
Sweden	25%
Switzerland	8%
UK	20%

ASIA	SALES TAX
China	13%
Hong Kong	0%
India	5.0%-12.36%
Indonesia	10%
Japan	8%
Malaysia	10%
Philippines	12%
Singapore	7%
South Korea	10%
Taiwan	5%
Thailand	7%

LATIN AMERICA	SALES TAX
Argentina	21%
Brazil	0%
Chile	19%
Colombia	16%
Ecuador	12%
Mexico	16%
Paraguay	10%
Peru	19%
Uruguay	0%
Venezuela	12%

AUSTRALASIA	SALES TAX
Australia	10%
New Zealand	15%

AFRICA	SALES TAX
South Africa	14%

Notes

Canada: Federal sales tax is 5%. Provincial sales tax varies by province.

USA: sales tax varies by state.

DIGITAL MUSIC SERVICES WORLDWIDE

The featured list of licensed digital music services appears on the Pro-Music information resource (www.pro-music.org) at the time of the report's publication and it is the most comprehensive directory of the world's legal digital music services. The list numbers over 450* licensed services in over 100 territories.

- A** [Afghanistan](#): Deezer [Albania](#): Deezer [Algeria](#): Deezer [Andorra](#): Deezer, Spotify [Angola](#): Deezer, THE KLEEK [Anguilla](#): iTunes [Antigua & Barbuda](#): Deezer, iTunes [Argentina](#): BajáMúsica, Batanga, Cien Radios, Daily Motion, Deezer, Faro Latino, Ideas Musik, iTunes, Larala, Movistar, MTV, Personal, Rdio, Spotify, Ubbi Música, Xbox Music, YouTube [Armenia](#): Deezer, iTunes [Aruba](#): Deezer [Australia](#): 7digital, Bandit.fm, Beatport, BigPond Music, Blackberry World, Deezer, Getmusic.com.au, Google Play, Guvera, iHeart Radio, iTunes, JB Hi Fi NOW, MOG, Music Unlimited, Nokia Mix Radio, Optus, Pandora, rara.com, Rdio, Samsung Music Hub, Songl, Spotify, The InSong, Vevo, VidZone, Xbox Music, YouTube [Austria](#): 3Music, 7digital, A1 Music, AmazonMP3, Ampya, Artistxite, Classical.com, Deezer, DG Webshop, eMusic, Finetunes, Google Play, iTunes, Jamba, JUKE, Ladezone, Last.fm, Mediamarkt, Musicload, MySpace, MyVideo, Napster, Naxos, Nokia Mix Radio, Preiser, Qobuz, rara.com, Rdio, Saturn, Schlager.tv, Simfy, SMS.at, Soulseduction, Spotify, Teling, T-Mobile, VidZone, Weltbild, Xbox Music, YouTube, Zed [Azerbaijan](#): Deezer, iTunes
- B** [Bahamas](#): Deezer, iTunes [Bahrain](#): Deezer, iTunes [Bangladesh](#): Deezer [Barbados](#): Deezer, iTunes [Belarus](#): Deezer, iTunes, Yandex Music [Belgium](#): 7digital, Beatport, Bleep, Bloom FM, Deezer, DJTUNES, Downloadmusic, eMusic, Fnac, Google Play, iTunes, Jamba, Jamster, Juke, Junodownload, Legal Download, Music Unlimited, Muziekweb, MUZU.TV, Napster, Qobuz, rara.com, Rdio, Simfy, Skynet, Spotify, Traxsource, VidZone, Xbox Music, YouTube [Belize](#): Binbit, Deezer, Digicel, iTunes, Movistar, YouTube [Benin](#): Deezer [Bermuda](#): Deezer, iTunes [Bhutan](#): Deezer [Bolivia](#): Batanga, Deezer, iTunes, Rdio, Spotify, YouTube [Bosnia and Herzegovina](#): Deezer [Botswana](#): Deezer, iTunes [Brazil](#): Deezer, Digital Virgo, Ideas Musik, iMusica, iTunes, Kboing, Mercado da Musica, Mundo Oi, Music Unlimited, Nokia Mix Radio, Power Music Club (GVT), rara.com, Rdio, Samsung Music Hub, Terra Musica Powered by Napster, TIM Music Store, Toing, UOL Megastore, Vevo, Vivo Musica by Napster, Xbox Music, Yahoo! Musica, YouTube [British Virgin Islands](#): Deezer, iTunes [Brunei](#): Deezer, iTunes [Bulgaria](#): 4fun, 7digital, Akazoo, Deezer, eMusic, iTunes, M.Dir.bg, Mobiltel, Spotify [Burkina Faso](#): Deezer, iTunes [Burundi](#): Deezer
- C** [Cambodia](#): Deezer, iTunes [Cameroon](#): Deezer [Canada](#): 7digital, Archambault, ArtistXite, AstralRadio, Bell Mobility, Blackberry Music Store, CBC Music, Classical Archives, Daily Motion, Deezer, eMusic, Galaxie Mobile, HMV Digital, iTunes, Mediazotic, Motime, MTV, Music Unlimited, Naxos, Nokia Mix Radio, Qello, rara.com, Rdio, Siren Music, Slacker, Songza, Vevo, Xbox Music, YouTube, Zik [Cape Verde](#): Deezer, iTunes [Cayman Islands](#): Deezer, iTunes [Central African Republic](#): Deezer [Chad](#): Deezer [Chile](#): Batanga, Bazuca, Claro, Deezer, Entel-Napster, iTunes, Movistar, Portaldisc, Rdio, Spotify, YouTube [China](#): 1ting, Baidu, China Mobile, China Telecom, Douban, Duomi, Kugou, Kuwo, Netease, Nokia Mix Radio, Tencent, Xiami [Chinese Taipei](#): Emome, Far Eastone, Hami+ Music, HiNet Funplay, INDIEVOX, iTunes, KKBOX, MTV, muziU, myMusic, Omusic, Spotify, Taiwan Mobile, VIBO, Vimeo, YouTube [Colombia](#): Batanga, Binbit, Codiscos, Deezer, ETB Musica, Ideas Musik, iTunes, Movistar, Prodiscos – Entertainment Store, Rdio, Spotify, Tigo, YouTube [Comoros](#): Deezer [Costa Rica](#): Batanga, Binbit, Deezer, Digicel, iTunes, Movistar, Rdio, Spotify, YouTube [Croatia](#): Cedeterija, Dallas Music Shop, Deezer [Cyprus](#): 7digital, Deezer, eMusic, iTunes, Spotify [Czech Republic](#): 7digital, Bontonline, Clickmusic, Deezer, eMusic, Google Play, iTunes, Koule, Mix_r.cz, MusicJet, O2, rara.com, Rdio, Spotify, Supraphonline, T-Music, Vodafone, YouTube
- D** [Democratic Republic of Congo](#): Deezer [Denmark](#): BibZoom.dk, CDON, Deezer, eMusic, iTunes, M1, Music Unlimited, Napster, rara.com, Rdio, Shop2download, Spotify, TDC Play, VidZone, WiMP, Xbox Music, YouSeeMusik (JUKE), YouTube [Djibouti](#): Deezer [Dominica](#): Deezer, iTunes [Dominican Republic](#): Deezer, iTunes, Rdio, Spotify
- E** [East Timor](#): Deezer [Ecuador](#): Batanga, Binbit, Deezer, Ideas Musik, iTunes, Movistar, Rdio, Spotify, YouTube [Egypt](#): Alamelphan, Anghamy, Deezer, iTunes, Mazzika Box, Yala Music, YouTube [El Salvador](#): Batanga, Binbit, Deezer, Digicel, iTunes, Movistar, Rdio, Spotify, YouTube [Equatorial Guinea](#): Deezer [Eritrea](#): Deezer [Estonia](#): 7digital, Deezer, eMusic, iTunes, muusika24.ee, rara.com, Rdio, Spotify [Ethiopia](#): Deezer
- F** [Fiji](#): Deezer, iTunes [Finland](#): 7digital, CDON, City Market CM Store, Deezer, Digianttila, eMusic, Google Play, iTunes, Musa24.fi, Music Unlimited, Napster, Nokia Mix Radio, NRJ Kauppa Mobile, rara.com, Rdio, Spotify, VidZone, Xbox Music, YouTube [France](#): 121 MusicStore, 7digital, Altermusique, AmazonMP3, Beatport, cd1d, Daily Motion, Deezer, Echopolite, eMusic, Ezic, FNAC Jukebox, Google Play, iTunes, Jamendo, Jazz en ligne, Last.fm, Music Unlimited, musicMe, Musicoverly, MyClubbingStore, MySurround, Napster, Nokia Mix Radio, Qobuz, rara.com, Rdio, Samsung Music Hub, SFR Music, Spotify, Starzik, Vevo, VidZone, Virgin Mega, Xbox Music, YouTube, Zaoza
- G** [Gabon](#): Deezer [Gambia](#): Deezer, iTunes [Georgia](#): Deezer [Germany](#): 7digital, AmazonMP3, Ampya, Artistxite, Beatport, boomkat, Classics Online, Clipfish, Col-legno, Deezer, digital-tunes, DJ Shop, DJTUNES, elixic.de, eMusic, e-Plus unlimited, Eventim Music, Finetunes, Google Play, Highresaudio, iTunes, Jamba, Juke, Junodownload, Last.fm, Linn Records, Make Music TV, Maxdome, Mediamarkt, Medionmusic, MTV, Music Unlimited, Musicload, MUZU.TV, MyVideo, Napster, Naxos Music Jazz Library, Nokia Mix Radio, O2, Putpat, Qobuz, rara.com, Rdio, Samsung Music Hub, Saturn, Schlager.tv, shop2download, Simfy, Spotify, tape.tv, T-Mobile, Tonspion.de, trackitdown, traxsource, Vevo, VidZone, Vodafone, Weltbild, whatpeopleplay.com, WiMP, Xbox Music, zwo3.net [Ghana](#): Deezer, iTunes, THE KLEEK [Greece](#): 7digital, Akazoo, Cosmote, Daily Motion, Deezer, eMusic, HOL Music Club, iTunes, Juno Download, mpGreek, MTV, MySpace, Napster, Naxos, Spotify, Vimeo, Wind, YouTube [Greenland](#): Deezer [Grenada](#): Deezer, iTunes [Guatemala](#): Batanga, Binbit, Deezer, Digicel, iTunes, Movistar, Rdio, Spotify, YouTube [Guinea](#): Deezer [Guinea-Bissau](#): Deezer, iTunes [Guyana](#): Deezer

*450 – although services are listed in every country they appear, they are only counted once in the overall figure e.g. iTunes is counted once in the figure of 450 etc.

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- Links to 450 legal music services in over 100 countries – listed by country and model
- Educational resources – copyright FAQs; a guide for parents and teachers; resources for schools; information about the global music industry

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- H** **Haiti:** Deezer **Honduras:** Batanga, Binbit, Deezer, Digicel, iTunes, Movistar, Rdio, Spotify, YouTube **Hong Kong:** 1010, 3Music, CMHK Soliton, Eolasia.com, hifitrack, iTunes, KKBOX, Moov, Musiccholic, MusicOne, Newsc Daily, OleGoK, Qlala, rara.com, Rdio, SmarTone iN, Soliton, Spotify, YouTube **Hungary:** Dalok, Deezer, Google Play, Hungaroton, iTunes, Muzzia, rara.com, Rdio, Songo, Spotify, YouTube, Zene! 24/7
- I** **Iceland:** 7digital, Bedroom Community, Deezer, Gogoyoko, Rdio, Spotify, Tonlist.is **India:** 7digital, Artist Aloud, Gaana, In, IndiaONE, iTunes, Meridhun, My Band, Nokia Mix Radio, Raaga, Saavn, Saregama, Smash Hits, TeluguOne **Indonesia:** Arena Musik, Deezer, Guvera, iTunes, Langit Musik, Melon Indonesia, Musikkamu, Ohdio, YouTube **Iraq:** Deezer **Ireland:** 7digital, ArtistXite, Bleep, Blinkbox, Deezer, eMusic, Golden Discs, Google Play, iTunes, Last.fm, Music Unlimited, MUZU.TV, MySpace, Napster, Nokia Mix Radio, Qobuz, rara.com, Rdio, Spotify, Vevo, VidZone, Xbox Music, YouTube **Israel:** iTunes, Rdio, YouTube **Italy:** 7digital, AmazonMP3, Azzurra Music, Beatport, Cubomusica, Deezer, eMusic, Google Play, IBS, InnDigital, iTunes, Jamba, Juke, Last.fm, MP3.it, Music Unlimited, Napster, Net Music Media World, Nokia Mix Radio, Playme, rara.com, Rdio, Samsung Music Hub, Spotify, Vevo, Xbox Music, YouTube **Ivory Coast:** Deezer
- J** **Jamaica:** Deezer, REGGAEinc **Japan:** Beatport, BeeTV, Best Hit J-Pop, clubDAM, Dwango, FaRao, GyaO!, ICJ, iTunes, KKBOX, Konami, Lismo, Listen Japan, Listen Radio, mora, mu-mo, Music Airport, Music Chef, Music Unlimited, Music.jp stream, Musing, MySound, Naxos, NOTTV, NTT DoCoMo Music Store, Oricon ME, Reco-Choku, Tsutaya Musico, Utapass, UULA, Xbox Music, YouTube **Jordan:** Deezer, iTunes
- K** **Kazakhstan:** Deezer, iTunes, Yandex Music **Kenya:** Deezer, iTunes, Mdundo, THE KLEEK **Kiribati:** Deezer **Kuwait:** Deezer **Kyrgyzstan:** Deezer, iTunes
- L** **Laos:** Deezer, iTunes **Latvia:** 7digital, Deezer, eMusic, iTunes, rara.com, Rdio, Spotify **Lebanon:** Deezer, iTunes **Lesotho:** Deezer **Liberia:** Deezer **Libya:** Deezer **Liechtenstein:** 7digital, Deezer, Google Play, Rdio, Spotify **Lithuania:** 7digital, Deezer, eMusic, iTunes, rara.com, Rdio, Spotify **Luxembourg:** 7digital, Deezer, eMusic, Google Play, iTunes, Napster, Qobuz, rara.com, Rdio, Spotify, VidZone
- M** **Macau:** iTunes, KKBOX **Macedonia:** Deezer **Madagascar:** Deezer **Malawi:** Deezer **Malaysia:** Akazoo, Deezer, DigiMusic, Infogo, iTunes, KKBOX, Maxis Music Unlimited, rara.com, Rdio, Spotify, The Cube, Wowloud, YouTube **Maldives:** Deezer **Mali:** Deezer **Malta:** 7digital, Deezer, eMusic, iTunes, Spotify **Marshall Islands:** Deezer **Mauritania:** Deezer **Mauritius:** Deezer, iTunes **Mexico:** Batanga, Corona Music, Deezer, Entreonos Movistar, EsMas Movil, Flycell, Google Play, Ideas Musik, Ideas Telcel, iTodo, iTunes, Mientras Contesto de Iusacell, Mixup Digital, Movistar, Music Unlimited, Nextel, Nokia Mix Radio, rara.com, Rdio, Spotify, Terra Live Music, Terra TV, Xbox Music, YouTube **Micronesia:** Deezer, iTunes **Moldova:** Deezer, iTunes **Monaco:** Deezer, Rdio, Spotify **Mongolia:** Deezer, iTunes **Montenegro:** Deezer **Morocco:** Deezer **Mozambique:** Deezer, iTunes
- N** **Namibia:** Deezer, iTunes **Nauru:** Deezer **Nepal:** Deezer, iTunes **Netherlands:** 7digital, Countdown, Deezer, Downloadmusic, eMusic, GlandigoMusic, Google Play, iTunes, Jamba, Juke, Last.fm, legal download, Mikkimusic, MSN, MTV, Music Unlimited, Muziekweb, Napster, Nokia Mix Radio, Qobuz, Radio 538, rara.com, Rdio, Spotify, Talpdownloads, TuneTribe, Vevo, VidZone, Xbox Music, You Make Music, YouTube, zazell.nl, Ziggo Muziek **New Zealand:** 7digital, Amplifier, Bandit.fm, Deezer, Fishpond, Google Play, iHeart Radio, iTunes, Music Unlimited, MySpace, Pandora, rara.com, Rdio, Spotify, The InSong, theaudience, Vevo, Vodafone New Zealand, Xbox Music, YouTube **Nicaragua:** Batanga, Binbit, Deezer, Digicel, iTunes, Movistar, Rdio, Spotify, YouTube **Niger:** Deezer, iTunes **Nigeria:** Deezer, iRoking, iTunes, Spinlet, THE KLEEK **Norway:** 7digital, CDON, Deezer, iTunes, Jamba, Music Unlimited, Musicnodes, Musikk Online, Musikkverket & Playcom, Napster, Nokia Mix Radio, Platekompaniet, rara.com, Rdio, Spotify, VidZone, WiMP, Xbox Music
- O** **Oman:** Deezer, iTunes
- P** **Pakistan:** Deezer **Palau:** Deezer **Panama:** Batanga, Binbit, Deezer, Digicel, iTunes, Movistar, Rdio, Spotify, YouTube **Papua New Guinea:** Deezer, iTunes **Paraguay:** Batanga, Bluecaps, Claro, Deezer, Ideas Musik, iTunes, Movistar, Personal, Rdio, Spotify, Tigo, YouTube **Peru:** Batanga, Binbit, Deezer, Ideas Musik, iTunes, Movistar, Rdio, Spotify, YouTube **Philippines:** Deezer, Globe, iTunes, OPM2Go, Smart, Spinnr, Sun, YouTube **Poland:** 7digital, Daily Motion, Deezer, Empik.com, eMusic, Gaude.pl, interia muzyka, iplay.pl, iTunes, Last.fm, Mood, MTV, Muzo, Muzodajnia, MySpace, Nokia Mix Radio, NuPlays, Onet Muzyka, Orange, Play The Music, Plus – Muzyka, rara.com, Rdio, Soho.pl, Spotify, T-Mobile, Tuba.pl, Vevo WiMP, wp.pl muzyka, YouTube **Portugal:** 7digital, Beatport, Deezer, eMusic, Google Play, iTunes, Jamba, Myway, Napster, Nokia Mix Radio, Optimus, Qmúsika, rara.com, Rdio, Spotify, VidZone, Vodafone, Xbox Music, YouTube
- Q** **Qatar:** Deezer, iTunes
- R** **Republic of the Congo:** Deezer **Romania:** 7digital, Cosmote, Deezer, Get Music, iTunes, Orange, Rimba, Triluliu.ro, Triplu, Vodafone, YouTube, Zonga **Russia:** Beeline, ClipYou.ru, Deezer, Google Play, iTunes, iviMusic, Megafon (Trava), Muz.ru, Nokia Mix Radio, Svoy, Tele2, Yandex Music, YouTube, Zvooq **Rwanda:** Deezer

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S [Saint Kitts and Nevis](#): Deezer, iTunes [Saint Lucia](#): Deezer [Saint Vincent and the Grenadines](#): Deezer [Samoa](#): Deezer [San Marino](#): Deezer [Sao Tome and Principe](#): Deezer [Saudi Arabia](#): Deezer, iTunes, Nokia Mix Radio [Senegal](#): Deezer [Serbia](#): Deezer [Seychelles](#): Deezer [Sierra Leone](#): Deezer [Singapore](#): 7digital, Deezer, iTunes, KKBOX, M 1 Music Store, MeRadio, Nokia Mix Radio, rara.com, Singtel AMPed, Singtel Ideas, Spotify, Starhub Music Anywhere, YouTube [Slovakia](#): 7digital, Deezer, eMusic, iTunes, MusicJet, Orange, Spotify, Telekom, YouTube [Slovenia](#): 7digital, Deezer, eMusic, iTunes [Solomon Islands](#): Deezer [Somalia](#): Deezer [South Africa](#): Deezer, iTunes, Lookandlisten.co.za, MTN Play, MySpace, Nokia Mix Radio, rara.com, Rdio, Simfy, THE KLEEK, Vimeo, YouTube [South Korea](#): Bugs, Cyworld BGM, Daum Music, Deezer, Genie, Groovers.kr, Helume, Hyundai Card Music, MelOn, Mnet, Monkey3, MPION, MUV, Naver Music, Ollehmusic, Soribada, YouTube [Spain](#): 7digital, AmazonMP3, Beatport, Blinko (Buongiorno), DaDa, Deezer, eMusic, Google Play, iTunes, Last.fm, Mediamarkt, Movistar, MTV, Music Unlimited, MUZU.TV, Napster, Naxos, Nokia Mix Radio, rara.com, Rdio, Samsung Music Hub, Spotify, Tuenti, Vevo, VidZone, Vodafone, Xbox Music, YouTube [Sri Lanka](#): Deezer, iTunes [Suriname](#): Deezer [Swaziland](#): Deezer, iTunes [Sweden](#): 7digital, CDON, Deezer, eClassical, eMusic, iTunes, Klicktrack, Music Unlimited, MySpace, Napster, Nokia Mix Radio, rara.com, Rdio, Sound Pollution, Spotify, Vimeo, WiMP, Xbox Music, YouTube [Switzerland](#): 7digital, Akazoo, AmazonMP3, ArtistXite, Cede.ch, Deezer, Ex Libris, Finetunes, Google Play, Hitparade.ch, iTunes, Jamster, Juke, Musicload, Napster, Nokia Mix Radio, Qobuz, rara.com, Rdio, Simfy, Spotify, Sunrise Joylife, VidZone, Weltbild, Xbox Music

T [Tajikistan](#): Deezer, iTunes [Thailand](#): 8 tracks, AIS, BEC-Tero Music, Daily Motion, Deezer, DTAC, H Music, i-humm, iTunes, KKBOX, MTV, Music Combo, Music One, MySpace, Qikplay, ThinkSmart, True Digital, True MP3 Combo, Vimeo, W Club, YouTube [Togo](#): Deezer [Tonga](#): Deezer [Trinidad and Tobago](#): Deezer, iTunes [Tunisia](#): Deezer [Turkey](#): Avea, Deezer, Fizy.com, iTunes, MusicClub, Spotify, TTnetmuzik, Turkcell, YouTube [Turkmenistan](#): Deezer, iTunes [Tuvalu](#): Deezer

U [UAE](#): Deezer, iTunes, Nokia Mix Radio [Uganda](#): Deezer, iTunes [UK](#): 7digital, Amazing Tunes, AmazonMP3, ArtistXite, Beatport, Bleep, Blinkbox, Bloom.fm, Boomkat, Classical Archives, Classical.com, Classics Online, Daily Motion, Deezer, Drum & Bass Arena, eMusic, Fairsharemusic, Google Play, Highresaudio, Historic Recordings, HMV Digital, Imodownload, iTunes, Jamster, Jango, Junodownload, last.fm, Linn Records, MixRadio (Nokia), Mobile Chilli, MSN, MTV, Music Unlimited, Musiccovery, MUZU.TV, My Music Anywhere, MySpace, Napster, Naxos, Nectar Music Store, O2, Orange, Play.com, Pure Music, Psonar, Qobuz, rara.com, Rdio, Running Trax, Sainsburys, Samsung Music Hub, Spotify, Textatrack UK, The Classical Shop, trackitdown, Traxsource, TuneTribe, Vevo, Vidzone, Virgin, Xbox Music, Yahoo! Music, YouTube [Ukraine](#): Deezer, iTunes, Last.fm, MusicClub, MUZon, Yandex Music, YouTube [United Republic of Tanzania](#): Deezer [Uruguay](#): Antel Musica, Batanga, Butia, Claro, Deezer, Ideas Musik, Movistar, Rdio, Spotify, Tmuy, YouTube [USA](#): 7digital, Acoustic Sounds, Alltel Wireless, AmazonMP3, AOL Radio Plus, Arkiv Music, ArtistXite, AT&T Wireless, Beatport, Beats Music, Blackberry World, CD Universe, ChristianBook.com, Classical Archives, Cricket, Daily Motion, eMusic, Free All Music, Freegal Music, Google Play, Guvera, Hastings, Hdtracks, Hulu, Insound, iOldies, iTunes, iTunes Radio, Liquid Spins, MetroPCS, MTV, Music Choice, Music Unlimited, MusicGivz, Muve Music, MySpace, Myxer, Nokia Mix Radio, Nokia+, Pro Studio Masters, Qello, rara.com, Rdio, Rhapsody, Samsung Music Hub, Slacker, Spotify, Sprint, TheOverflow, T-Mobile, Verizon Wireless, Vevo, Virgin, Xbox Music, Yahoo! Music, YouTube, ZUUS [Uzbekistan](#): Deezer, iTunes

V [Vanuatu](#): Deezer [Venezuela](#): Batanga, Binbit, Deezer, Digicel, Ichamo, iTunes, Movistar, Rdio, YouTube [Vietnam](#): Deezer, iTunes

Y [Yemen](#): Deezer

Z [Zambia](#): Deezer [Zimbabwe](#): Deezer, iTunes

This is a list of digital music services from around the world that appears on the Pro-Music website (www.pro-music.org). Pro-Music is endorsed by an alliance of organisations representing international record companies (majors and independents), publishers, performing artists and musicians' unions.

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