



Victoria Yarmoshchuk
CEO FILM.UA Group
v.yarmoshchuk@film.ua



Gain unparalleled insights into Ukraine's content market through the lens of the country's leading media group FILM.UA



Advertising market

2022 - 2024

	Results of 2022, mln EUR	Results of 2023, mln EUR	Percentage change 2022 to 2023, %	Expectations 2024 Sept, mln EUR	Percentage change 2024 to 2023, %
TV advertising, total	57,8	85,8	49%	135,3	58%
Direct advertising	52,6	79,8	48%	124,2	60%
Sponsorships	5,2	8,2	58%	11,1	35%
Digital TV	n/a	10,0	n/a	17,7	78%
Advertising in the press, total	7,6	7,9	4%	8,6	8%
National press	4,9	5,2	6%	5,7	10%
including sponsorship	1,2	1,2	0	1,4	11%
Regional press	1,1	1,4	0	1,2	6%
Specialized press	1,6	1,6	1%	1,7	6%
OOH Media, total	38,9	71,9	85%	103,2	43%
Outdoor advertising	30,2	46,2	53%	66,7	45%
Transit advertising	2,0	13,7	n/a	17,5	28%
DOOH	6,1	11,2	85%	17,9	60%
Indoor advertising	0,7	0,9	39%	1,1	21%
Radio advertising, total	7,4	19,2	160%	25,0	30%
National	5,3	12,2	129%	17,0	39%
Regional	0,7	1,7	127%	1,9	13%
Sponsorship	1,3	5,3	300%	6,1	15%
Digital (Internet) Media advertising	159,5	304,6	78%	372,1	22%
Total advertising media market	271,1	499,5	77%	661,9	33%

Source: VRK

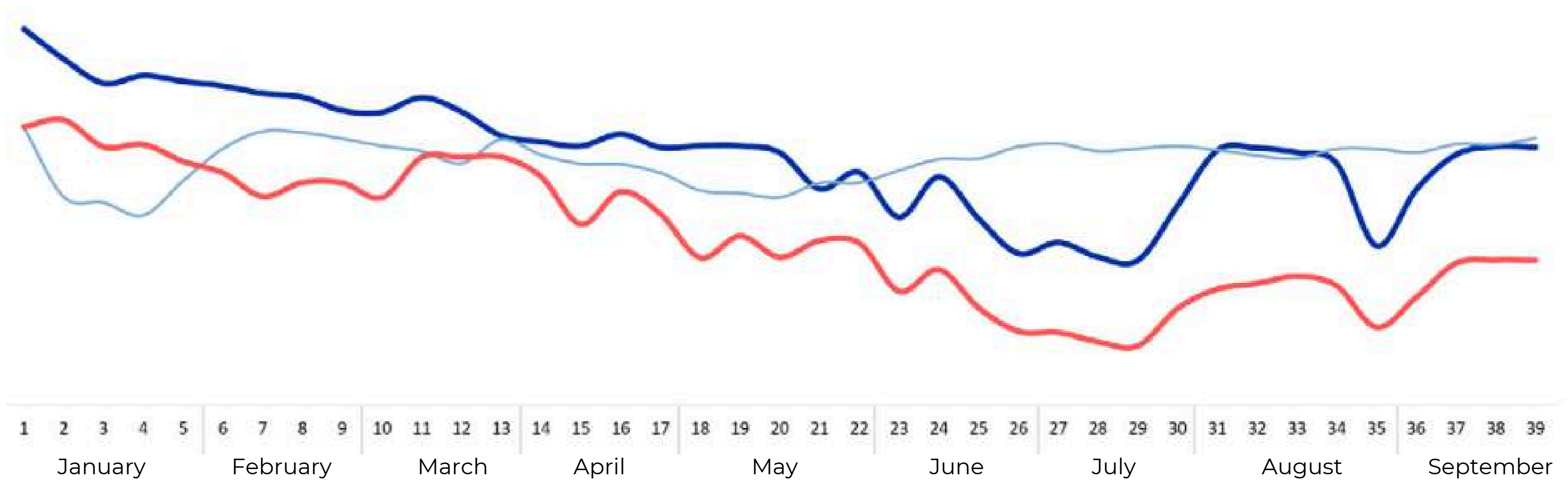


Advertising on TV

Life in new reality

Power outages limit all types of content

TV. TVR% TotalTV 2024 TV. TVR% TotalTV 2023 YouTube. Starlight Media UA 2024



Source: Nielsen Ukraine, TVR% TotalTV, TA 18-54,50+; YouTube StarlightMedia, UA content views. Periods: 1-39 weeks of 2023-2024. Data correlation ~92%.

Source: Nielsen Ukraine, WGRP TA 18-54,50+. Categories: all, FMCG and Pharma. Period: January-September 2023-2024

Demand for TV inventory has increased

+38% WGRP by 2023



+139% FMCG WGRP growth categories



+15% Pharma WGR growth categories



Audience

Quantity, structure, dynamics

Amount of TV households in cities of 50+:

2021 – 86% TV households

6 685 334 – 5 733 000

2023 – 75% TV households

5 936 598 – 4 442 000

2024 – 87% TV households

5 250 949 – 4 593 000

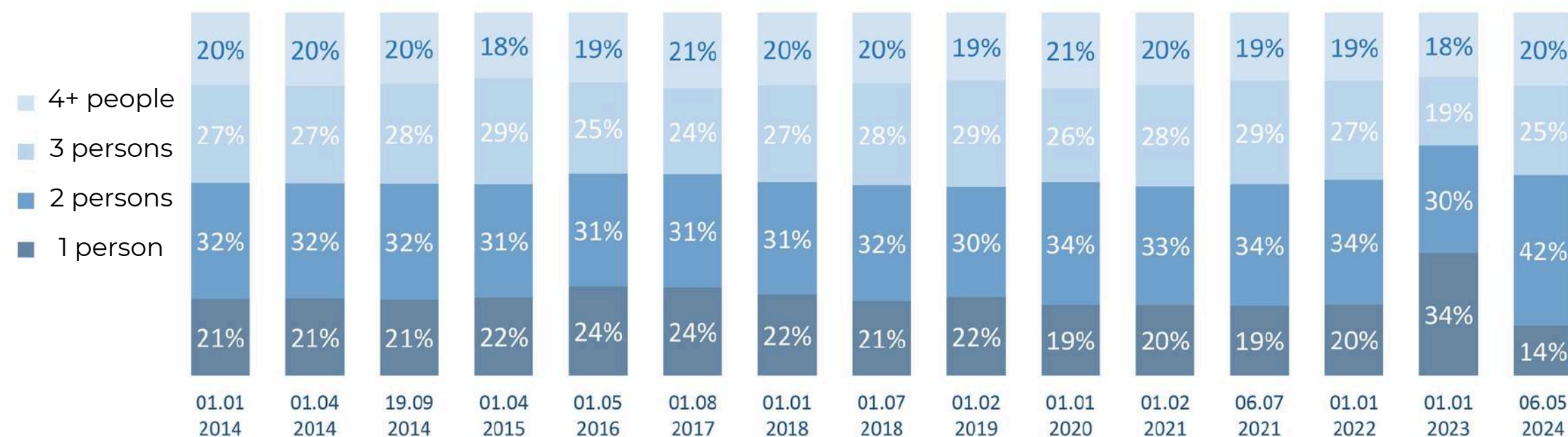
Dynamics of the share of TV households

% of all households. Cities of 50+



Dynamics of the size of TV households

% of TV households. Cities 50+



Source: Television Industry Committee



TV viewing

TV Ratings

18-54 (50+)

		2021
Channel		18-54 (50+)
		shr%
	Other TV	31.35
1	ICTV	9.40
2	1+1	8.99
3	СТБ	8.30
4	Україна	7.62
5	Новий канал	7.14
6	Інтер	4.74
7	2+2	4.05
8	TET	2.99
9	НТН	2.04
10	К1	1.53
11	ПлюсПлюс	1.09
12	НЛО-TV	1.07
13	Мега	1.03
14	Enter-фільм	0.84
15	М1	0.76
16	Піксель	0.70
17	Індіго TV	0.64
18	Сонце	0.61
19	Прямий	0.60
20	24 Канал	0.53

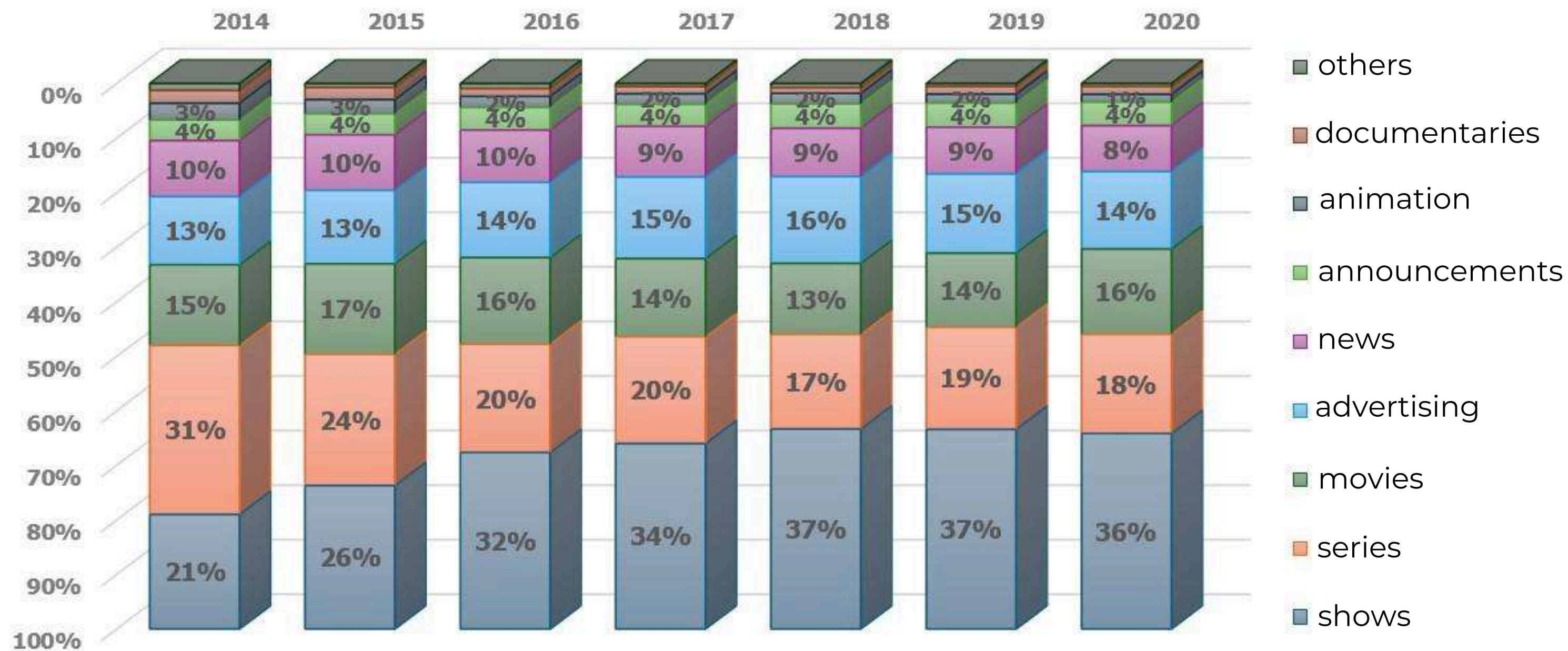
		2023
Channel		18-54 (50+)
		shr%
	Other TV	42.22
1	СТБ	8.75
2	Новий канал	7.82
3	ICTV2	6.67
4	Марафон новин	6.59
5	2+2	5.50
6	TET	4.26
7	1+1 Україна	3.40
8	НТН	2.93
9	ПлюсПлюс	1.75
10	Сонце	1.48
11	Бігуді	1.26
12	ОЦЕ	1.06
13	Enter-фільм	0.95
14	Мега	0.91
15	КВАРТАЛ TV	0.71
16	К1	0.65
17	УНІАН	0.53
18	М1	0.53
19	COMEDY CENTRAL	0.35
20	Піксель	0.33

		1 half of the 2024
Channel		18-54 (50+)
		shr%
	Other TV	42.69
1	СТБ	7.55
2	Новий канал	7.36
3	ICTV2	6.34
4	Марафон новин	5.46
5	2+2	4.86
6	TET	4.16
7	НТН	3.60
8	1+1 Україна	3.57
9	Бігуді	1.92
10	ОЦЕ	1.68
11	Твій серіал	1.60
12	ПлюсПлюс	1.32
13	К1	1.03
14	Мега	1.01
15	УНІАН	0.99
16	Enter-фільм	0.94
17	Сонце	0.77
18	М1	0.43
19	Світло	0.41
20	КВАРТАЛ TV	0.38

Source:
Television Industry Committee, panel
operator - Nielsen; designed for the
audience of 18-54 (50+)

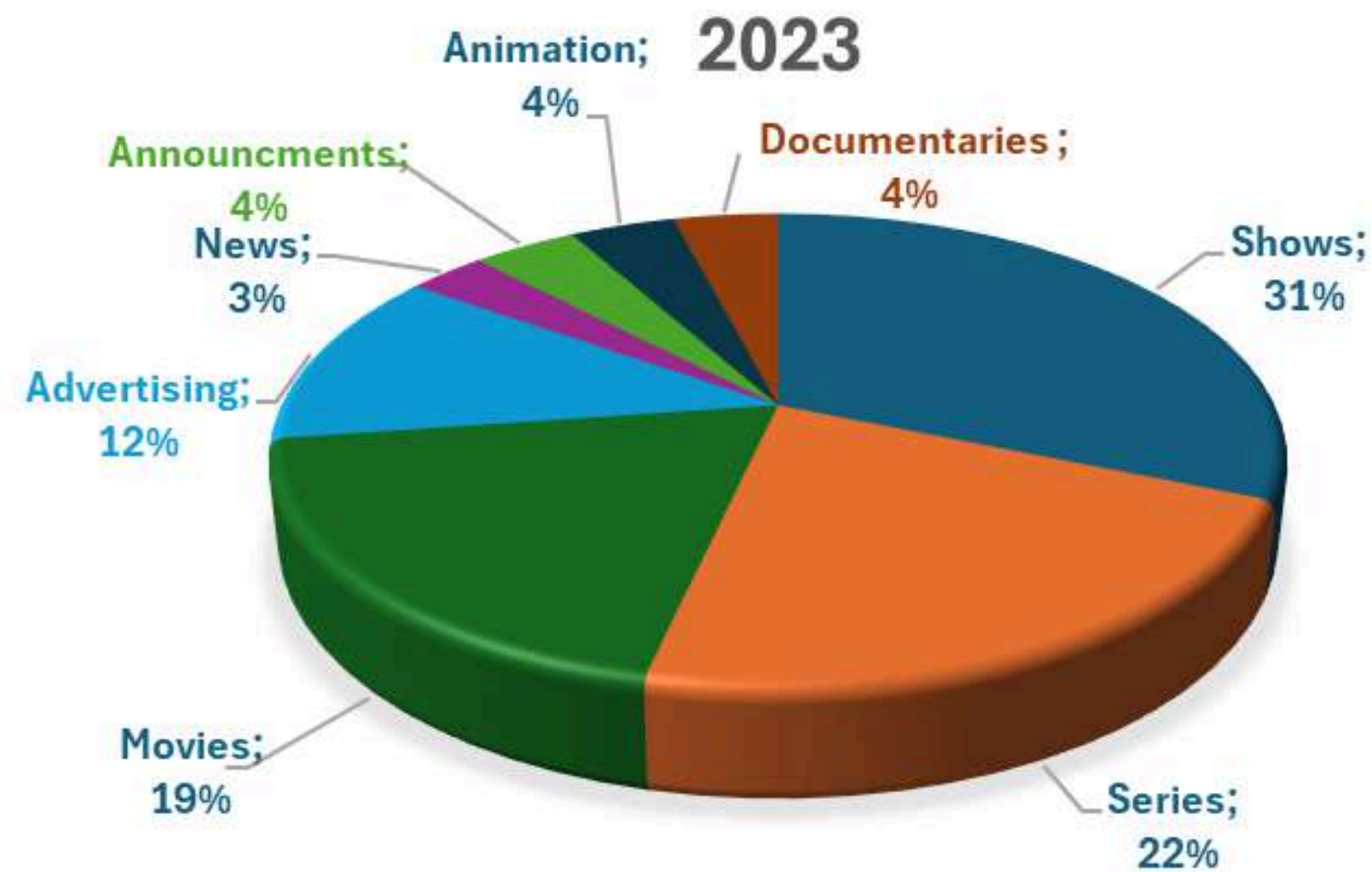
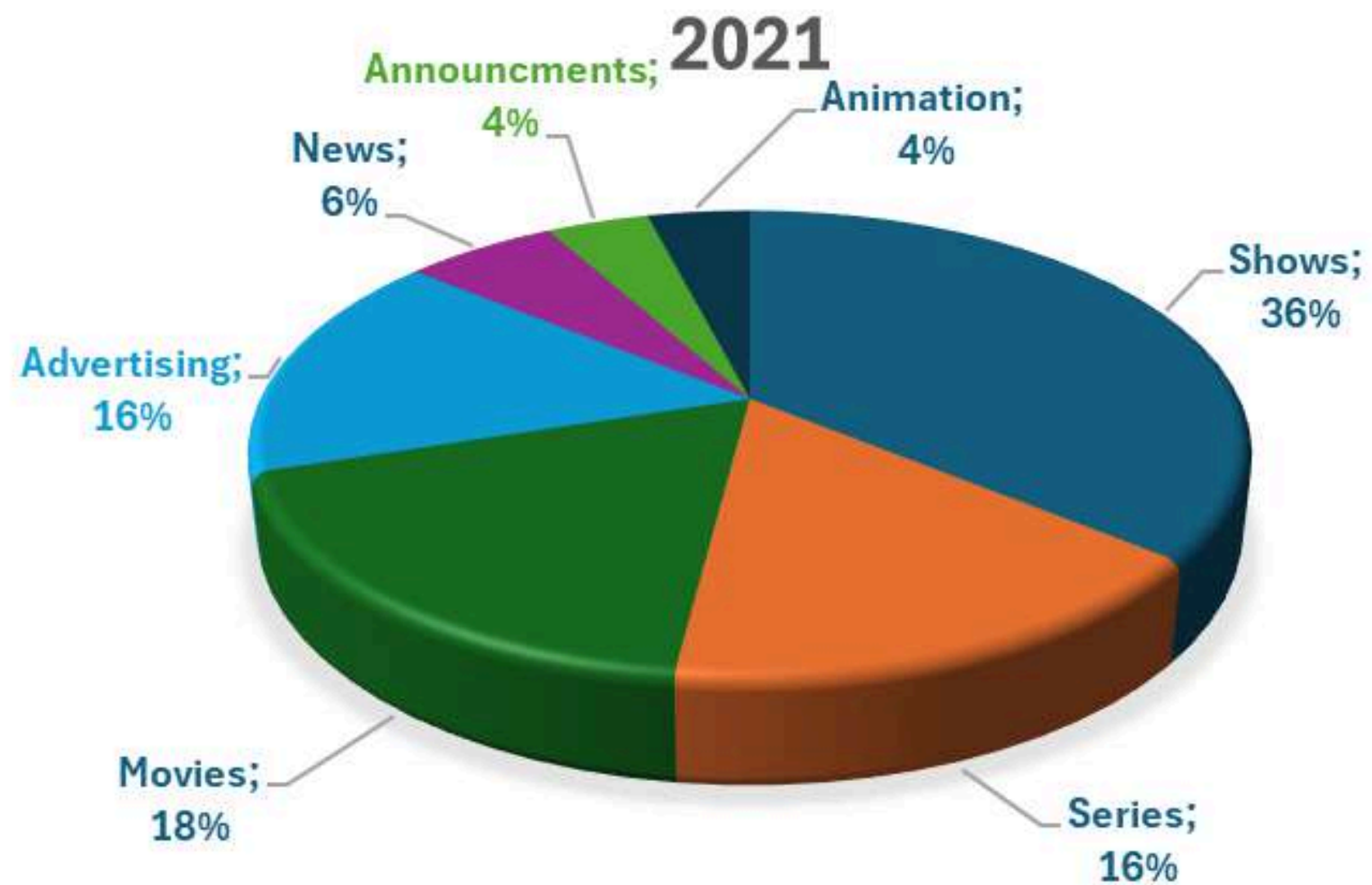
The structure of TV broadcasting

Broadcasting on top channels 2014-2020 (%)



The structure of TV broadcasting

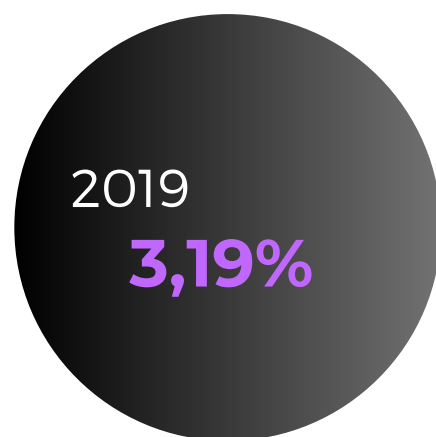
Broadcasting on top channels 2021, 2023 (%)





Film distribution in Ukraine

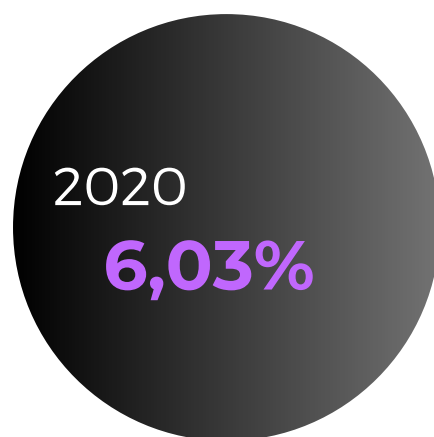
Total box office



The total box office is
2 883 690 000 UAH / \$111.6 million

Box office of Ukrainian releases
91,850,000 UAH / \$3.55 million

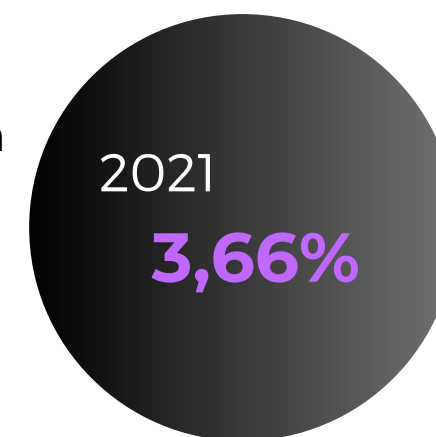
The share of Ukrainian films
in the box office - **3.19%**



The total box office
UAH 992,800,000 / \$36.82 million

Box office of Ukrainian releases
59 900 000 UAH / \$2.22 million

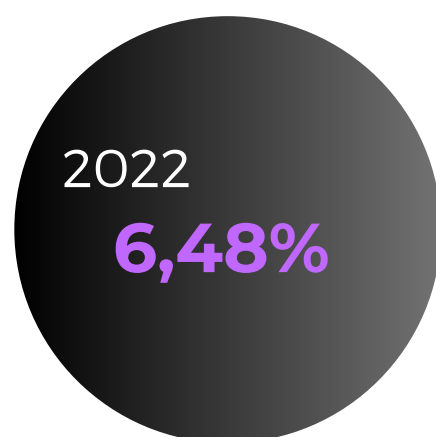
The share of Ukrainian films
in the box office - **6.03%**



The total box office
UAH 1,749,510,000 / \$64.11 million

Box office of Ukrainian releases
63 990 000 UAH / \$2.34 million

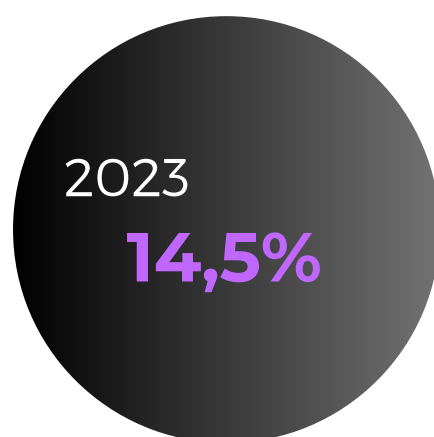
The share of Ukrainian films
in the box office - **3.66%**



Total box office for 2022
(excluding January and February)
UAH 1,155,160,000 / \$35.72 million

Box office of Ukrainian releases
UAH 74,820,000 / \$2.31 million

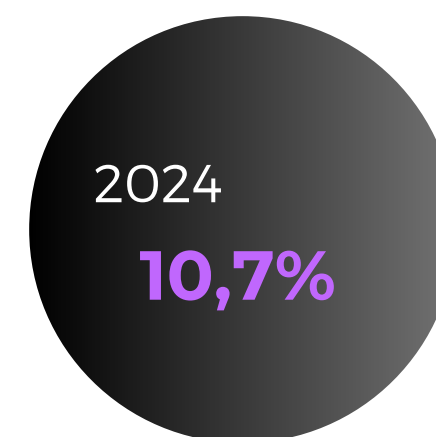
The share of Ukrainian films
at the box office - **6.48%**



The total box office
2,244,412,293 UAH / \$61.3 million

Box office of Ukrainian releases
UAH 324,464,123 / \$8.83 million

The share of Ukrainian films
in the box office - **14.5%**



Total box office
(through September 18)
UAH 1,617,576,530 / \$40.7 million

Box office of Ukrainian releases
173,233,285 UAH / \$4.3 million

The share of Ukrainian films
in the box office - **10.7%**



Film distribution in Ukraine

Top 10 films

2023

2024

title	premiere	distributor	box office, UAH	box office, \$
Mavka: The Forest Song	02.03.2023	Kinomania, FUAD	156 161 727	4 270 378
Avatar: The Way of Water	15.12.2022	Kinomania	128 299 381	3 508 458
Barbie	20.07.2023	Kinomania	123 370 194	3 373 665
Oppenheimer	20.07.2023	B&H	122 716 202	3 355 781
Dovbush	24.08.2023	Kinomania, FUAD	68 531 881	1 874 064
Guardians of the Galaxy Vol. 3	04.05.2023	Kinomania	67 704 142	1 851 428
Five Nights at Freddy's	26.10.2023	B&H	65 985 861	1 816 942
Wonka	14.12.2023	Kinomania	63 727 351	1 719 883
Fast & Furious X	18.05.2023	B&H	62 861 005	1 718 989
Elemental	15.06.2023	Kinomania	60 895 812	1 665 249

title	premiere	distributor	box office, UAH	box office, \$
Inside Out 2	13.06.2024	Kinomania	131 889 066	3 250 161
Deadpool & Wolverine	25.07.2024	Kinomania	122 481 184	2 977 653
Dune: Part Two	29.02.2024	Kinomania	112 788 053	2 952 823
Despicable Me 4	03.07.2024	B&H	100 325 392	2 461 676
Kung Fu Panda 4	07.03.2024	B&H	69 366 001	1 800 762
Anyone But You	25.01.2024	B&H	67 182 914	1 784 945
Rocky Road to Belin	14.03.2024	B&H	59 324 059	1 523 523
Bad Boys: Ride or Die	06.06.2024	B&H	56 482 507	1 396 747
The Witch. Revenge	22.08.2024	Kinomania, FUAD	55 612 709	1 286 732
Beekeeper	11.01.2024	Kinomania	43 771 079	1 157 804

Leading market players

starlight_media



1+1 media
group of companies



G R O U P



INTER
MEDIA GROUP



 **sweet.tv**

 **КИЇВСТАР•ТБ**



MEGOGO





Ukrainian films at international film festivals

2022-2023

69 films

more than 80 festivals

27 films

7 class A festivals

38 films

88 awards

7 films

awards at festivals
class A

7 films

10 other international
awards and nominations

Most Awarded

“Klondike”, “Pamfir”, “Butterfly Vision”,
“A House Made of Splinters”,
“20 Days in Mariupol”, “La palisiada”,
“In the Rearview”, “Unnecessary things”
(animation)

2024

30 films

25 festivals

7 films

4 class A festivals

7 films

11 awards

0 films

awards at festivals
class A

“20 Days in Mariupol”

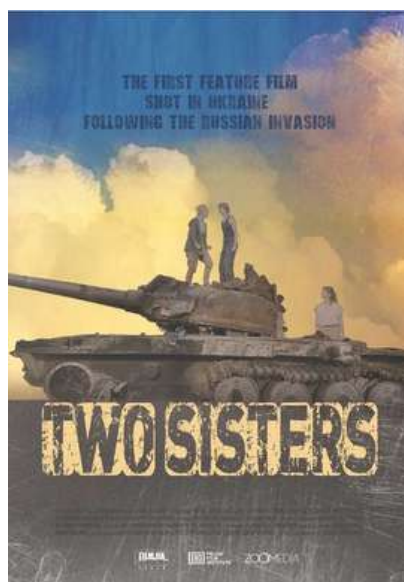




FILM.UA: MOVIES, SERIES, NON-SCRIPTED CONTENT

Projects 2022-2023

FEATURE FILMS



TWO SISTERS
FILM.UA
Zoom media (PL)



BUCHA
Bucha Film
FILM.UA



EASTER EGG
Mamas Production
FILM.UA
StarLightMedia



THE WITCH. REVENGE
FILM.UA

TV&DIGITAL



HERO
FILM.UA Television
with the support
of Ukrainian Cultural Fund



DOUGH
FILM.UA Television



MEDIA AT WAR
FILM.UA Television
with the support of USAID

SERIES



CITIZENS AT WAR
FILM.UA, Tilt Media (AU)
GTV Docs (GB) Red Arrow Studios International (DE)
commissioned by ZDF (DE) SVT (SW)/ NRK (NO)/ YLE (FIN)



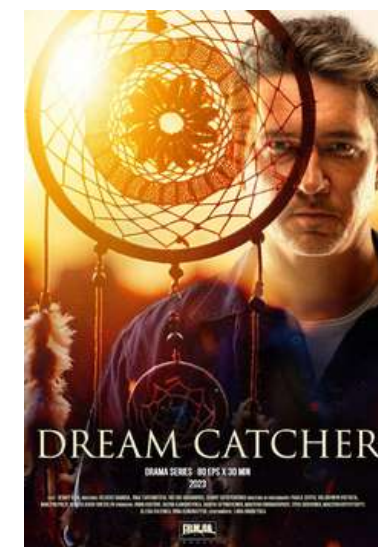
THOSE WHO STAYED
FILM.UA



CRAZY NEIGHBORS 2
FILM.UA
Prototype Production



DR. BABY DUST: NEW LIFE
FILM.UA
1+1 media



DREAM CATCHER
FILM.UA
1+1 media

ANIMATION



MAVKA. THE FOREST SONG
Animagrad Studio (FUAG)



BRAVE BUNNIES
SEASON 2
Glowberry (FUAG)
WildBrain (CA)
Anima (ES)



FILM.UA: MOVIES, SERIES, NON-SCRIPTED CONTENT

Projects for 2025

GROUP

FEATURE FILMS



DECEMBER 31st EXPRESS



MASON



RED RUE



THE DAM



THE POTION



MAVKA



FAMILY SQUAD (satirical animation)



DOGGIES

SERIES



DR. BABY DUST: NEW LIFE 80 x 45'



DOCTOR ON CALL 6-7 80 x 45'



SOTNYK VS SOTNYK 40 x 45'



DOVBUSH. OUR DAYS 24 x 25'



VITYA 20 x 20'



FURIES 20 x 25'



WITCH 20 x 25'



LIFE FOR THREE 20 x 25'



OUR HALIA 8 x 45'



THE DISAPPEARED 6 x 30'

DOCUMENTARIES



KVITKA. I'M COMING TO YOU



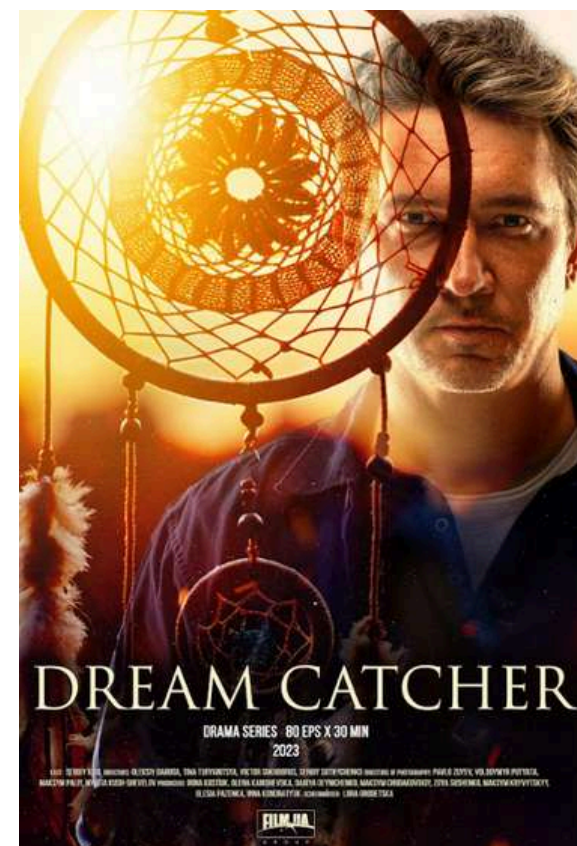
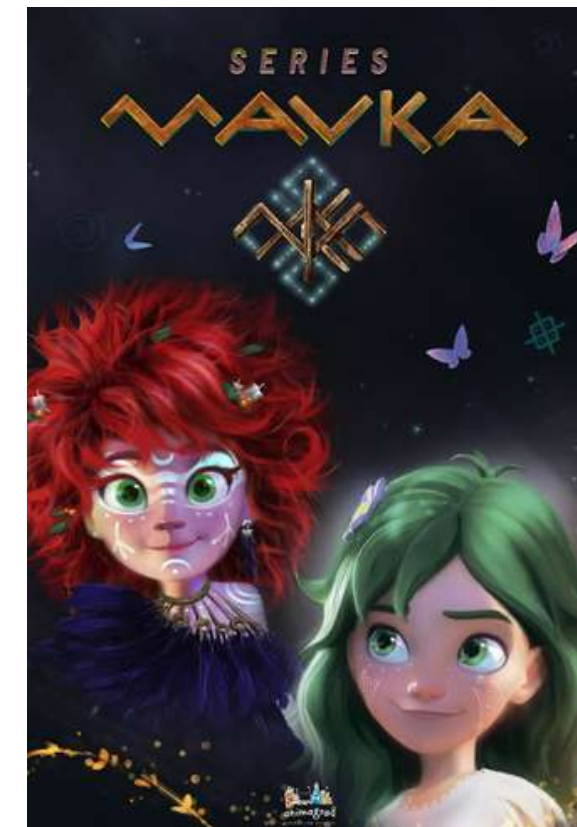
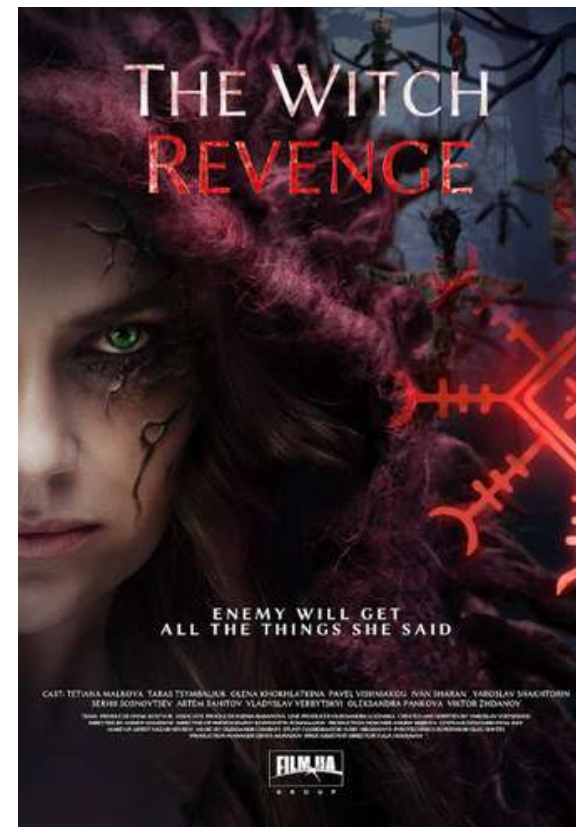
MELODY OF FREEDOM



YOU [ROMANCE]



FILM.UA at MIPCOM 2024





Thank you!

Contact Us

Victoria Yarmoshchuk

CEO

 v.yarmoshchuk@film.ua

 www.film.ua