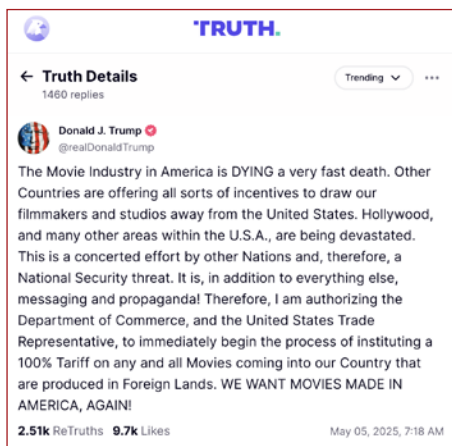


So this happened...



... & now what?

Our take at www.contentasia.tv

India's JioStar flags US\$10b+ content spend

"India continues to be an exciting pay-TV market and will be for a while," Uday Shankar says

JioStar is doubling down on content investment, pouring approximately US\$3.6 billion into programming this year, with plans to increase spending further in 2026, JioStar vice chairman, Uday Shankar, said at the inaugural WAVES mega-event in India at the weekend.

The full story is on page 3

Plus...

WAVES was a Grand Spectacle, "but you need to go past the glamour," says Vanita Kohli-Khandekar of India's biggest-ever media & entertainment event.

Opinion on page 4

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Industry leaders & iconic mascots unite at Gwangju ACE Fair 2024

For two decades, the Gwangju ACE Fair has been a key destination for global content creators, industry leaders, and visionaries looking to collaborate and expand their reach. As the event celebrates its 20th anniversary and aligns with the Year of Visiting Gwangju, attendees will experience a dynamic showcase of the latest trends in Broadcasting & OTT, Animation & Characters, and Digital Content, including games, the Metaverse, and immersive technologies like AR, VR, and XR. From 28-31 August 2025, the fair promises an exciting window into the future of entertainment.

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The Gwangju ACE Fair 2024 set a new record with an export consultation amount of US\$369.18 million

Building on the success of its previous edition – which attracted 400 exhibitors, 190 buyers, and over 44,000 visitors from 30 countries – ACE Fair 2025 is poised to deliver even greater opportunities for business expansion and networking. This anniversary edition will feature exclusive matchmaking programs, investment consultations, and industry forums tailored to help participants forge meaningful collaborations.

ACE Fair has established itself as a premium international platform, bringing together K-Content giants, media corporations, and emerging creative talents. Attendees will gain firsthand access to a thriving market. With industry leaders such as CJ ENM and CCTV participating, exhibitors and buyers alike can explore co-production opportunities, licensing deals, and strategic partnerships that drive global success.

Game-Changing Industry Insights



Gwangju ACE Fair 2024 keynote by Pixar Animation Studios' Dylan Sisson

A highlight of ACE Fair is the prestigious Content Developer Conference (CDC), an event that consistently draws the industry's most influential experts. Last year's keynote by Pixar Animation Studios' Dylan Sisson captivated audiences, followed by insightful discussions on AI-driven content, emerging digital platforms, and the evolution of virtual entertainment markets.

This year, the 5th CDC promises to be even more impactful, beginning with a keynote session on The Expansion and Future of the Content Market with Generative AI. Leading professionals will delve into groundbreaking topics, including AI-powered content creation and distribution, IP expansion strategies, and the continued transformation of streaming platforms. With nearly half of the attendees coming from international markets, CDC remains an essential forum for forward-thinking content developers seeking industry-defining insights.

Connect with the Best in the Industry

ACE Fair is more than just an exhibition – it's a gateway to unparalleled net-



Connecting 500+ industry leaders with exclusive networking at Gwangju ACE Fair 2024

working with some of the most influential names in entertainment. Participants will have the chance to engage with renowned companies such as CJ ENM, CCTV, Globo TV, and leading representatives from Taiwan's joint licensing pavilion. Over 85% of past attendees praised their ACE Fair experience, with many eager to return, underscoring the event's reputation as an essential platform for sustainable business success.

For those looking to solidify their presence in the content industry, ACE Fair 2025 offers unmatched exposure. Exhibitor applications are open until 18 July 2025, with an exclusive early-bird discount available for registrants before 30 May 2025. Buyers can also register for premium access to exhibitors, ensuring strategic networking and investment opportunities that will keep them ahead in the global entertainment landscape.

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- ❁ **Dates:** 28-31 August 2025
- ❁ **Venue:** KDJ Convention Center, Gwangju, Korea
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- ✉ Have questions? Reach out to the ACE Fair Secretariat at os@acefair.or.kr. Step into the future of K-Content & Animation Excellence at ACE Fair 2025 – the ultimate hub for content innovators worldwide!

India's JioStar flags US\$10b+ content spend in three years

"India continues to be an exciting pay-TV market and will be for a while," Shankar says

JioStar is doubling down on content investment, pouring approximately US\$3.6 billion into programming this year, with plans to increase spending further in 2026, JioStar Vice Chairman, Uday Shankar, said in India at the weekend during the first World Audio Visual and Entertainment Summit (WAVES).

In 2024, the company spent INR25,000 crores/US\$3 billion on content alone. In 2025, content investment will rise to INR30,000 crores/US\$3.6 billion, and the number next year will be over INR32,000-35,000 crores/US\$3.8 billion-US\$4.1 billion.

"In three years, we have spent more than US\$10 billion," Shankar told delegates at the inaugural mega-event held at Jio World Convention Centre.

Talking on stage to Media Partners Asia (MPA) executive director, Vivek Couto, Shankar said the narrative that pay-TV was dead was false.

"Since we brought two major companies together, pay TV has added subscribers, not lost them. We've focused sharply, and the results speak for themselves. India continues to be an exciting pay-TV market and will be for a while," he said.

JioStar today had half a billion people coming to the platform, "and we have a large number of people subscribing and paying for it ... well over 250 million paying customers that will grow further with the IPL finals in May," he said.

Shankar highlighted the need for much more content tailored for the Indian market with the ability to travel.

He said that while the distribution infrastructure had expanded to places with new languages and dialects, content innovation had not always matched audience expectations.

"Viewers are far ahead of where providers are. We still think that importing global content is enough. But India needs a massive volume of content tailored to Indian tastes – regional, cultural, linguistic. And ideally, it should be strong enough to travel globally," he said.

The content environment is not with-



Picture: x.com/WAVESummitIndia

Clockwise from above: Narendra Modi, Prime Minister of India at WAVES 2025; Vivek Couto, Media Partners Asia (MPA)



out challenges.

"Theatrical in North India has taken a huge dip and Hindi movies also have taken a huge hit," Shankar said.

"Bollywood is frozen in time in terms of the nature of product it creates, while consumers have moved forward. 65% of India's population is under 35 years of age."

"This market is enormous. If we innovate the way we should on content, product, and business models. There's no reason why Indian media can't double in size or produce global giants."

New research by Media Partners Asia, IP House and the Confederation of Indi-

an Industry unveiled at WAVES showed how effective anti-piracy measures could expand the addressable market, boost industry revenue, and support new employment across India's creative economy.

The report – "The Impact of Piracy on India's Online Video Sector and Creative Economy" – said that "without decisive measures, piracy could cost India's creative economy up to US\$2.4 billion by 2029".

Potential gains with effective anti-piracy measures include an overall 25% surge in legal service usage across India's digital video sector, and the creation of approximately 158,000 new jobs across India's creative industries.

WAVES 2025 was inaugurated by Prime Minister Narendra Modi, who talked about India's rich cinematic history, the deep-rooted connection between creativity and human experience, and said that "India is not only home to a billion-plus population but also a billion-plus stories". He described WAVES as "roaring with purpose".

WAVES – A Grand Spectacle in India

“But you need to go past the glamour,” says Vanita Kohli-Khandekar

Shah Rukh Khan in any room, anywhere in the world, gets attention. When you have Khan welcoming the Indian prime minister Narendra Modi with the biggest names in show business watching, the world sits up and takes notice. If the idea behind World Audio-Visual and Entertainment Summit (WAVES) 2025 was to draw the world’s attention to India’s creative industries, it did.

The might of its US\$29 billion media and entertainment (M&E) business was on full display on the first four days of May at the Jio World Centre in Mumbai.

On the talent side speakers ranged from film stars like Khan, actor and Louis Vuitton’s brand ambassador Deepika Padukone to musicians such as Oscar winner A.R. Rahman and filmmaker S.S Rajamouli (of RRR fame) among many others.

On the business side there was Ted Sarandos (co-CEO, Netflix), Neal Mohan (CEO, YouTube), Mukesh Ambani (chairman and MD, Reliance Industries) and Uday Shankar (vice chairman, JioStar)....

A pavilion where over 100 firms across content, broadcasting and media-tech displayed their offerings, a Start-up segment, a film bazaar, gaming, animation, shorts competitions, talks, panel discussions, entertainment evenings and lots of networking were among the attractions. This was a spectacle through and through.

But you need to go past the glamour.

India is the world’s largest producer of films, the second largest television market and one of the largest consumers of video. It has about 900 million TV viewers (across pay and free TV) and 650 million smartphone users. Notice that these are volume-centric metrics.

On value, the entire Indian M&E sector is a third of Walt Disney Company’s revenues. But unlike many other markets it has been growing, albeit patchily. From 8.3% in 2023, revenue growth slowed to 3.3% in 2024, thanks to a fall in pay revenues in TV and falling revenues from animation and visual effects.

The M&E sector is expected to grow

at over 7% annually until 2027, reaching US\$36.1 billion says EY’s latest FICCI-Frames report.

Two things are needed to unlock value for Indian entertainment in the domestic and global markets – more screens and more capital.

Many of the discussions at WAVES touched upon the screen part. “The biggest hits have a footfall of about 35 million people; that is just 2% of our population. Where is the remaining 98% watching our films? For a vast number of Indians there is no local cinema to go to,” said actor/producer Aamir Khan.

At about 8,700 screens, India has just six screens for every million of its people compared to say 125 in the U.S. or 30 in China.

Take smartphones, the other screen where revenues are growing in double digits. The number of smartphone users has been stuck for almost three years because of high prices. For millions of Indians, a smartphone is the first port of entry into the internet. As sales stagnate, the reach of digital media has been stagnating, though revenue continues to rise on the back of rising hours of usage by existing audiences.

The capital bit was not really in focus at WAVES. But if India wants to be the studio of the world, as the EY report released around the event suggests, it needs a lot more capital.

Development centres set up by Google, Meta, Amazon, Microsoft, and others leveraging India’s mobile user base to design apps and features that integrate payments, utilities and emerging tech are huge job generators. Ditto for the Indian Institute of Creative Technology, announced by India’s Information and Broadcasting Minister Ashwini Vaishnaw at the event. Both of these leverage India’s tech and content chops.

But India’s strength is also in telling stories. It is the only country along with Korea where local entertainment rules on the small and big screen without any protection or import quotas on foreign programming.



“WAVES has done a great job of spotlighting India’s M&E business. The job of building the blocks that help unlock its true potential remains.”

Vanita Kohli-Khandekar

However, except for the Rs1,000 crore from Adar Poonawalla into Karan Johar’s Dharma Productions, there has been no action in the content space.

Streaming firms, which brought in money from 2018-2021 or so, have now stabilised content spends. The announcement that JioStar will be spending US\$3.6 billion on programming this year then is good news.

WAVES has done a great job of spotlighting India’s M&E business. The job of building the blocks that help unlock its true potential remains.

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100+
EXHIBITORS

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BUYERS

300+
COMPANIES

1000+
PARTICIPANTS

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9 – 12 JUN 2025



And the winner is... Udine

Specialist Asian film festival dons a larger mantle

Her Story, a Chinese feminist drama movie, was named the top prize-winner at the Far East Film Festival in Italy's Udine in the small hours of Saturday morning. An extended version of Hong Kong box-office record-breaker *The Last Dance* also collected multiple awards. But the overall winner was the festival itself.

Now in its 27th edition, FEFF Udine has completed a transition from European fan event, one focused on commercial not art-house Asian films, to an essential stop on the Asian film industry calendar.

One wag suggested that Udine is becoming an alternative and substitute for the mighty Cannes festival, which starts a short hop away in southern France in a matter of days. FEFF's narrower geographical focus and its different selection criteria are unlikely to ever make that completely true.

But Udine has emerged as a cheaper to use and more efficient industry event for companies in the business of developing, producing and distributing Asia-Pacific films.

Several participants judged it important enough to make the 27-hour trip from Australia.

A project market, works-in-progress screenings, a conference series with a focus on East-West coproduction and finance, as well as a mentoring programme now receive support from local institution backers as diverse as the Italian Ministry of Culture, the Friuli-Venezia-Giulia Audiovisual Fund and multiple agencies of the European Union.

They now see the festival as a component of the FVG region's soft-power outreach, along with the Venice Biennale, the Venice film festival and another festival dedicated to animation in Pordenone. Udine's museums and shops decorate themselves for the occasion.

International backing comes from Taiwan's TAICCA, four different Hong Kong agencies, Japan's Visual Industry Promotion Office, the Film Development Council of the Philippines, the German Federal Film Board and Telefilm



Her Story

Canada.

Industry-focused conference sessions addressed matters such as improving distribution of European films in Asia and how producers can use AI-powered focus groups. (Hint: once trained, the virtual group members replicate their real-world role models' opinions with a 90% accuracy and are available 24-7 for a year.)

The festival proper also organises an annual campus that trains youngsters from Asia and Europe in the dark arts of film criticism and industry reporting.

Udine's highlights nevertheless remain the films and filmmakers themselves.

Triple Tokyo festival winner "Teki Cometh" and the controversial Hong Kong family drama "Papa" were standouts in a programme of nearly 70 films.

Taiwan superstar Sylvia Chang was on hand to receive a lifetime achievement award. So too was pioneering director Tsui Hark, who gave a masterclass and presented a sumptuous 4K restoration of his 1984 comedy *Shanghai Blues*.

– By Patrick Frater

Far East Film Festival, Udine, 2025 Prize Winners

Gold Audience Mulberry "Her Story" (China) dir. Shao Yihui.

Silver Audience Mulberry "The Last Dance (Extended Version)" dir. Anselm Chan.

Crystal Audience Mulberry "Like a Rolling Stone" (China) dir. Yin Lichuan
Purple Mulberry: "Silent City Driver" (Mongolia)

White Mulberry for best first-time director "Diamonds in the Sand" (Philippines, Japan, Malaysia) dir. Janus Victoria.
Special mention: "The Square" (Korea) dir. Kim Bo-sol.

Mulberry for best screenplay: "Welcome to the Village" (Japan) dir. Jojo Hideo.

Black Dragon Audience Award: "The Last Dance (Extended Version).

TAICCA/Focus Asia Co-Production Award (EUR10,000 development support prize): Filipino project *What's Left of Us*, directed by Tyrone Acierto and produced by Wilfredo Manalang (FUSEE)

The BIG List

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Incognito
ABS-CBN Studios
Genre: Action
Episodes/length: approx. 60x45 mins



Dino Ranch: Island Explorers Boat Rocker
Genre: Kids & Family, Comedy/Adventure/Pre-School
Episodes/length: 52x11 mins




Valley of Hearts
Inter Medya
Genre: Drama
Episodes/length: 82x45 mins



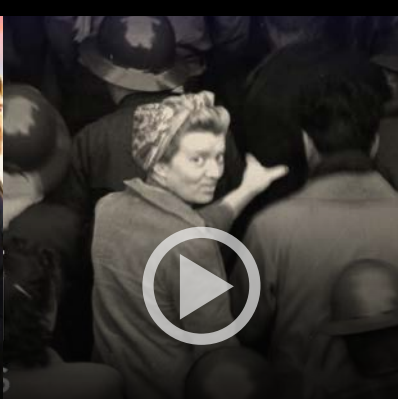
The Family Burden
Kanal D International
Genre: Drama (2024)
Episodes/length: 95x44 mins



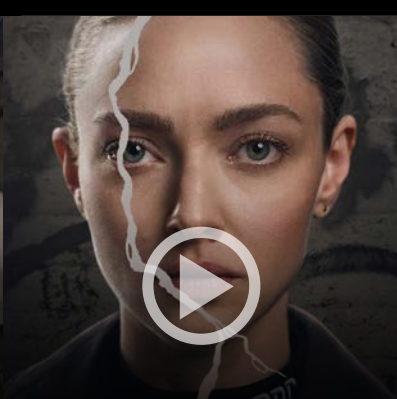
Song of the Fireflies
MQ Worldwide
Genre: Musical Drama
Length: 95 mins



Suits LA
NBCUniversal Global TV Distribution



Women of World War II : The Untold Stories
PBS Distribution
Genre: Documentary
Episodes/length: 1x60 mins



Long Bright River
Sony Pictures Entertainment
Genre: Drama
Episodes/length: 8x60 mins

To include your company in next month BigList issue, reach out to

- malena@contentasia.tv for Asia, Australia & Middle East
- leah@contentasia.tv for Americas & Europe
- cj@contentasia.tv for China & Taiwan



15 Aug deadline for second Animation Nation ANSEA Awards

Entries for this year's Animation Nation Southeast Asia (ANSEA) Awards close on 15 August, with a special first-time prize for best short film in partnership with the DreamWorks Channel.

Creators are being asked to submit two-minute original short films for the new category and a 100-word synopsis exploring the theme of "family".

Finalists will be announced in September, followed by the ANSEA Awards screenings and winners announcement in October/November. Animation Nation, the Singapore Film Society's festival of animation works, was started in 2004 by the Singapore Film Society.



Japan's WOWOW ends April at 2.4 million subs

Japanese platform WOWOW ended April – the first month of its new fiscal year – with 2,352,264 subscribers, with cancellations outstripping new subscriptions by 7,448 the platform has disclosed.

The company said the 61,140 new subscriptions in April 2025 were driven by the UEFA Champions League and UEFA Europa League, along with live events such as the Tohoshinki 20th Anniversary LIVE TOUR ZONE in Tokyo Dome. Cancellations increased as targeting programmes came to an end.

More than 800,000 subs cancelled in the year to end March 2025.

Pixel debuts with *MasterChef Pakistan* Deal comes on the heels of first Netflix Pakistan original

Banjijay Rights returns *MasterChef* to Pakistan after an 11-year break in a deal with the Pixel Entertainment, the new Karachi-based outfit launched in February this year by Rizwan Siddiqui, Raheel Usman and Tariq Qazi, with former FOX Networks Group exec, Sanjay Raina as head of international business.

The broadcast partner for the new show is being secured by Pixel Entertainment – launched in Feb this year.

The broadcast platform has not yet been disclosed.

The deal, brokered by Rashmi Bajpai, Banijay Rights' EVP Asia, is part of what looks like a slowly expanding profile for Pakistan's video production industry.

In November last year, the first local version of *Shark Tank* went to air and a second season is said to be in the works.

In June, Netflix said to be premiering its first Pakistani original, *Jo Bachay Hain Sang Samait Lo* by Momina Duraid Productions, which was also behind *Meem Se Mohabbat* (2024) and *Ehd-e-Wafa* (2019), as well as the 2018 TV series, *Aangan* for Hum TV.

Social media sites are all over the rumours based on a comment from writer Farhat Ishtiaq, who wrote the novel upon which the series is based. Netflix has not made its plans for the series public but is listed on IMDB as the distributor.

Directed by Momina Duraid, *Jo Bachay Hain Sang Samait Lo* is about a Harvard law student who experiences a life-changing incident that makes him

keep others at bay and a talented artist who is bursting with life but has had a troubled past. The drama series is based on Farhat Ishtiaq's 2013 novel. The series was filmed in 2023 in Italy, the U.K. and Pakistan.

Pakistan has not exactly been a hotbed for format adaptations, but, when it does commit to an international property,

it clearly prefers high-profile top-tier titles.

In 2024, Grenlit Studios produced a local version of Sony Pictures Television-distributed *Shark Tank*.

The show – the only format adaptation on air in Pakistan in 2024 – aired on Green TV Entertainment and streamed on YouTube and on the Myco platform.

According to ContentAsia's Formats Outlook, the two titles are the sole unscripted properties to be adapted for Pakistan since data collection began in 2017.

Pixel Entertainment co-founder Rizwan Siddiqui, who also co-founded Grenlit Studios in January 2024, said in the 1 May *MasterChef* announcement that Pakistan's rich culinary traditions would be showcased in the new season.

MasterChef has long been an unscripted staple in Asia. More than 40 versions/seasons have aired since 2017, including 11 seasons in Indonesia, and multiple language versions in India. Local adaptations have also been made in Bangladesh, Cambodia, Myanmar, Singapore and Thailand.



Clockwise from top: Co-founders Rizwan Siddiqui, Tariq Qazi, Raheel Usman



Prime Video sweeps up CJ ENM drama

Head Over Heels kicks off multi-year distribution deal



From left: David Simonsen, Director – SEA MENA, Prime Video; Jangho Seo, EVP, CJ ENM content business division; Gaurav Gandhi, VP – APAC MENA, Prime Video; Kelly Day, Head of International and VP, Prime Video

Prime Video has picked up global rights to a slate of CJ ENM Korean titles in a "strategic collaboration" announced this weekend during the World Audio Visual & Entertainment Summit (WAVES) in India. The distribution agreement does not include Korea and China.

The multi-year exclusive deal, which includes titles from CJ ENM, Studio Dragon and CJ ENM Studios, kicks off next month with new fantasy romance *Head Over Heels*, and also includes a bouquet of library titles such as romcom *Another Miss Oh* (2016) and detective series *Mouse* (2021).

The exact number of titles/hours involved in the new deal has not been disclosed.

All the titles will be available across Prime Video's 240+ country/territory footprint with subtitles in 28 languages and dubbing in 11, Prime Video said in Saturday's announcement.

In India for WAVES, Jangho Seo, EVP of CJ ENM's content business division, highlighted the success of *Marry My Husband* and *No Gain, No Love*, which he said "achieved remarkable viewership milestones on Prime Video".

Prime Video's Kelly Day, head of International & VP, said the acquisitions, which will roll out across this year and next, underscored the platform's "commitment to making entertainment bor-

derless by providing a global platform to Asian content".

"Korean content continues to resonate deeply with global audiences," Day said, adding that Korean titles had "found their place in [Prime Video's] top 10 most-watched non-English language international originals in 2024. Unlike Netflix, Amazon does not make regular ranking details public.

Gaurav Gandhi, Prime Video's VP for APAC/MENA, said the CJ ENM collaboration marked "a new chapter".

The deal is a win for CJ ENM, which may so far have had less success than it might have liked engaging audiences outside of Asia.

For example, *Weak Hero Class 2* (Netflix's top global non-English title for the week of 21-17 April) did not make it onto the top 10 in any North American markets. In Europe, the series was on the top 10 in 10 markets, including Belgium (#10), Estonia (#9), France (#9), Greece (#7) and Serbia (#10).

Resident Playbook, by CJ ENM's Eggiscoming, didn't make it to the top 10 in any outside of Asia, Oman, Qatar and Saudi Arabia.

Prime Video's original content activities in Asia continue to be dominated by India, including *Paatal Lok*, *Dupahiya*, *Mirzapur* and *Farzi* along with films such as *The Mehta Boys*.

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Contact CJ at cj@contentasia.tv

What's on where...

May 2025	15-16	LA Screenings Independents 2025	Los Angeles, U.S.
	26	AVIA: Satellite Industry Forum 2025	Singapore
	28-30	19th Busan Content Market 2025 (BCM)	Busan, Korea
June 2025	12-14	Telefilm Vietnam 2025	Ho Chi Minh City, Vietnam
	23-27	30th Shanghai TV Festival 2025	Shanghai, China
	23-26	Sunny Side of the Doc 2025	La Rochelle, France
	24-26	APOS 2025	Bali, Indonesia
July 2025	2-4	17th Content Tokyo 2025	Tokyo, Japan
	7-8	DW Global Media Forum 2025	Bonn, Germany
	23-26	Beijing International Radio, TV & Film Exhibition 2025	Beijing, China
August 2025	28-31	Gwangju Ace Fair 2025	Gwangju, Korea
September 2025	2-3	ContentAsia Summit ContentAsia Premieres 2025	Taiwan
	4	ContentAsia Awards 2025	Taiwan
	2	AVIA: Archipelago Video Summit 2025	Jakarta, Indonesia
	16-19	BCWW 2025	Seoul, Korea
	17-26	Busan International Film Festival (BIFF) 2025	Busan, Korea
	20-23	Asian Contents & Film Market 2025	Busan, Korea
October 2025	11-12	MipJunior 2025	Cannes, France
	13-16	Mipcom 2025	Cannes, France
	28	AVIA: Northeast Asia Video Summit 2025	Tokyo, Japan
	29-31	TIFFCOM 2025	Tokyo, Japan
November 2025	4-7	Taiwan Creative Content Fest 2025 (TCCF)	Taipei, Taiwan
	4-5	Dubai International Content Market 2025 (DICM)	Madinat Jumeirah, Dubai
	30 Nov-7 Dec	Jogja-NETPAC Asian Film Festival 2025	Yogyakarta, Indonesia
	29 Nov-1 Dec	JAFF Market 2025	Yogyakarta, Indonesia
December 2025	2	Asia TV Forum & Market 2025 (ATF) – ATF Leaders Dialogue	Singapore
	3-5	Asia TV Forum & Market 2025 (ATF) – Market & Conference	Singapore
	3-4	AVIA: Asia Video & OTT Summit 2025	Singapore
February 2026		Mip London 2026	London, U.K.
		The London TV Screenings 2026	London, U.K.
March 2026	24-26	Series Mania Forum 2026	Lille, Hauts-de-France

Daredevil: Born Again, Invincible win Vietnam Netflix, Prime Video neck and neck on demand top 10

Disney+'s *Daredevil: Born Again* and Prime Video's *Invincible* ran neck and neck in Vietnam's demand stakes for the week of 14-20 April, according to Parrot Analytics. Both titles were about 19 x difference from demand for the average title measured by Parrot in the market during the week.

Overall, Netflix titles took four spots on the digital demand top 10 (British

sci-fi series *Black Mirror*, Korean drama *When Life Gives You Tangerines*, U.S./ France animated action series *Arcane* and Korean blockbuster *Squid Game*) on the digital top 10, level with Prime Video's four (*Invincible*, *Reacher*, *The Wheel of Time* and *The Boys*). The other two places went to Apple TV+ (*Severance*) and Disney+ (*Daredevil: Born Again*).

Top 10 overall TV originals: Vietnam

Rank	Title	Difference from Market Average (x times)
1	<i>Daredevil: Born Again</i>	19.2
2	<i>Invincible</i>	19.0
3	<i>My Hero Academia</i>	18.7
4	<i>Black Mirror</i>	16.2
5	<i>When Life Gives You Tangerines</i>	14.9
6	<i>Solo Leveling</i>	14.0
7	<i>Arcane</i>	13.8
8	<i>The White Lotus</i>	13.7
9	<i>The Loop</i>	13.1
10	<i>The Last Of Us</i>	12.9

Top 10 digital originals: Vietnam

Rank	Title	Platform	Difference from Market Average (x times)
1	<i>Daredevil: Born Again</i>	Disney+	19.2
2	<i>Invincible</i>	Prime Video	19.0
3	<i>Black Mirror</i>	Netflix	16.2
4	<i>When Life Gives You Tangerines</i>	Netflix	14.9
5	<i>Arcane</i>	Netflix	13.8
6	<i>Reacher</i>	Prime Video	12.9
7	<i>Severance</i>	Apple TV+	12.4
8	<i>Squid Game</i>	Netflix	11.7
9	<i>The Wheel Of Time</i>	Prime Video	11.4
10	<i>The Boys</i>	Prime Video	9.3

Date range: 14-20 April 2025

The total audience demand being expressed for a title, within a market. Audience demand reflects the desire, engagement and viewership, weighted by importance; so a stream/download is a higher expression of demand than a 'like'/comment. In this dataset we are comparing the demand that exists for each series in this market, against the average TV show. A difference of 1x represents the market average and 10x means a series is ten times more in demand than the average TV show in this market



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White Lotus tops Max titles in SE Asia

U.S. drives top 10 shows; India's *Legends of Shiva* at #9



The White Lotus season 3

Top Max Titles (Mar 2025, Southeast Asia)

	Title	Type	Origin	Genre
1	The White Lotus	Series	U.S.	Drama, Romance
2	Suits LA	Series	U.S.	Drama, Romance
3	The Americas	Series	U.S.	Documentary
4	Fall Guy	Movie	U.S.	Action, Adventure
5	The Righteous Gemstones	Series	U.S.	Comedy
6	The Pitt	Series	U.S.	Drama, Romance
7	MaXXXine	Movie	U.S.	Horror
8	St Denis Medical	Series	U.S.	Comedy
9	Legends of Shiva	Series	India	Documentary
10	The Last of Us	Series	U.S.	Action, Adventure

Source: Media Partners Asia, Chart: ContentAsia

Max's early slate in Southeast Asia is a mix of prestige U.S. drama and niche genres. The platform launched in mid-November 2024. By end-Q1 2025, Max reached 1.55 million subscribers across Southeast Asia, led by Thailand through its partnership with telco AIS, according to data from Media Partners Asia (MPA).

Max titles have yet to break the overall top 15 titles in the region. Initial traction and trending titles show strong performance of U.S. content across genres.

The White Lotus was the top title in Southeast Asia in March, with notable popularity in Indonesia and Thailand, where over 25% of Max users watched the title.

The top 10 titles reveal a blend of procedurals (*Suits LA*, *The Pitt*), factual programming (*The Americas*, *Legends of Shiva*), genre movies (*Fall Guy*, *MaXXXine*), and breakout comedies (*The Righteous Gemstones*, *St. Denis Medical*).

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