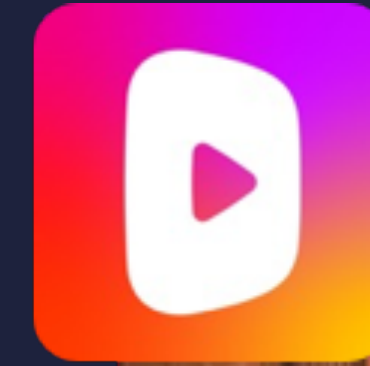


# State of Short Drama Apps 2025:

Global Expansion Insights





# Sensor Tower

## Introduction/Overview

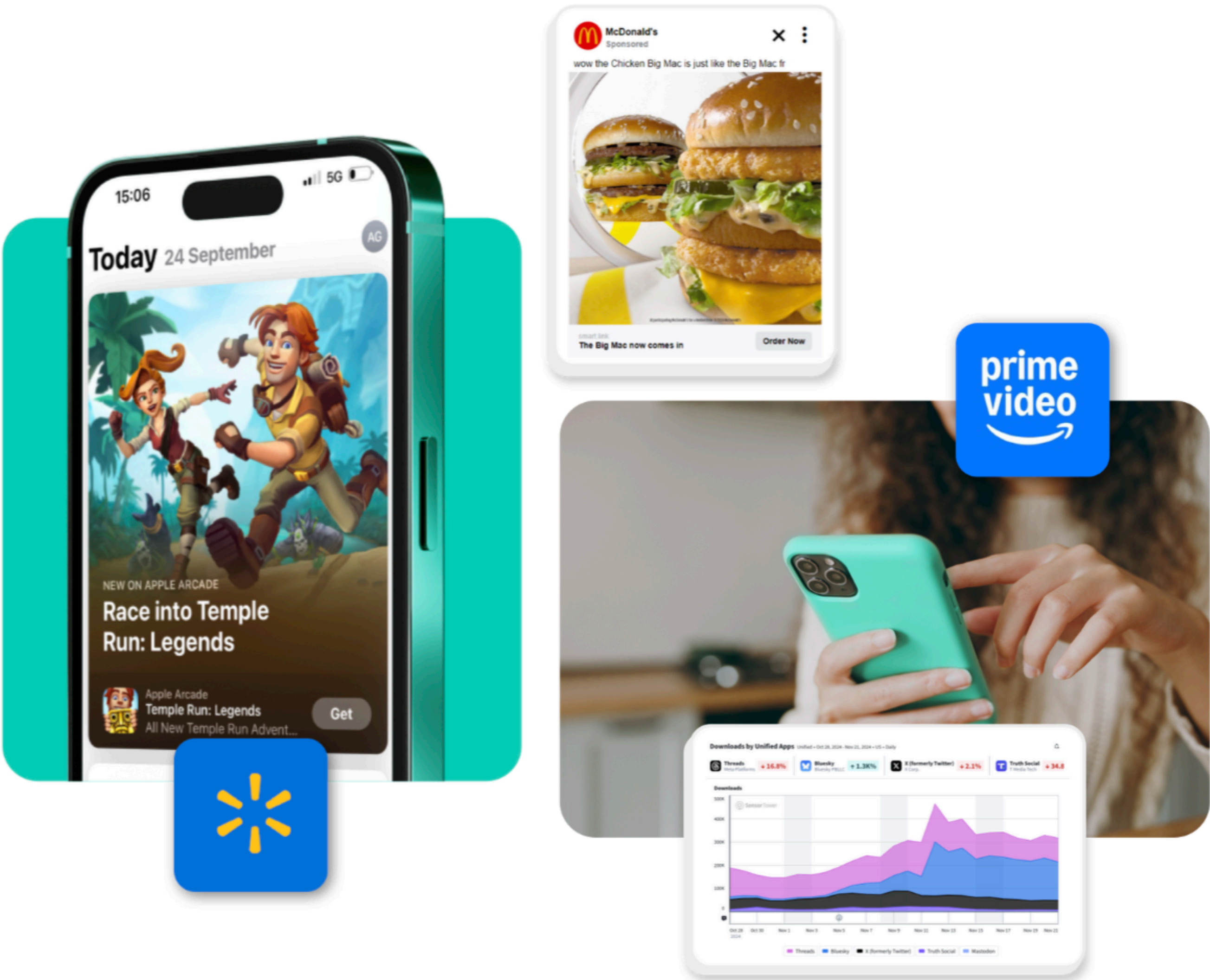
Sensor Tower is the leading source of mobile app, digital advertising, retail media, and audience insights for the largest brands and app publishers across the globe.

With a mission to measure the world’s digital economy, Sensor Tower’s award-winning platform delivers unmatched visibility into the mobile app and digital ecosystem, empowering organizations to stay ahead of changing market dynamics and make informed, strategic decisions.

Founded in 2013, Sensor Tower’s mobile app insights have helped marketers, app, and game developers demystify the mobile app landscape with visibility into usage, engagement, and paid acquisition strategies. Today, Sensor Tower’s digital market insights platform has expanded to include Audience, Retail Media, and Pathmatics Digital Advertising Insights, helping brands and advertisers understand their competitor’s advertising strategies and audiences across web, social, and mobile.











**Press Inquiries:** [press-apac@sensortower.com](mailto:press-apac@sensortower.com)

**Business Inquiries:** [sales@sensortower.com](mailto:sales@sensortower.com)



# Sensor Tower | Our Customers

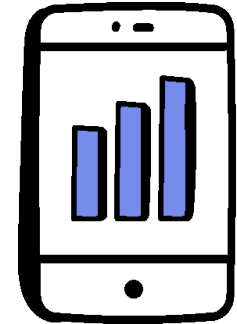
Top publishers trust Sensor Tower insights to grow their business.

L'ORÉAL		Google		 European Commission	Disney
petco	HERSHEY	amazon	ROVIO	DOORDASH	depop
Walmart		Microsoft	SEGA	dyson	SONY
 fetch REWARDS		Meta	OUTFIT7	Gett.	ByteDance
Alibaba	POPeYeS	Tencent 腾讯	 WARNER BROS. GAMES	P&G	NBA
 CVS Health.	 Domino's	Johnson & Johnson		Welch's	Revolut

Note: Top publishers by app store revenue | Source: Sensor Tower



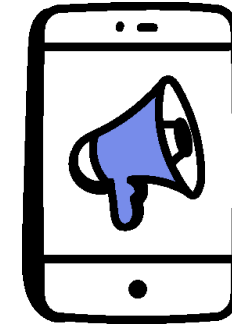
# Sensor Tower Solutions



## Sensor Tower **App Performance Insights**

**For those who need visibility  
into the mobile app ecosystem.**

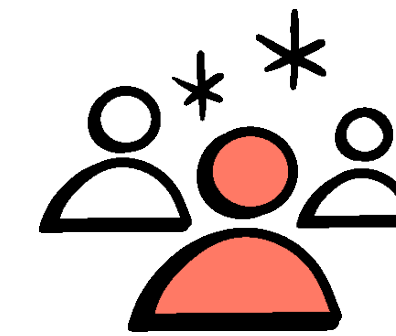
Enjoy insight into: app rankings, downloads, and revenue; active users, demographics, retention, sessions, and time spent; app ratings and reviews, keywords, search ads, and more.



## Sensor Tower **App Advertising Insights**

**For those who need visibility  
into paid user acquisition  
strategies.**

Enjoy insight into: global and regional share of voice (SOV) across apps and the biggest mobile app ad networks, top advertisers, publishers, creatives, and more.



## Sensor Tower **Audience Insights**

**For those who need visibility  
into your existing, competitor,  
and potential new audiences.**

Enjoy insight into: which apps consumers are actually interacting with (app engagement) AND which ads they're seeing (ad exposure).



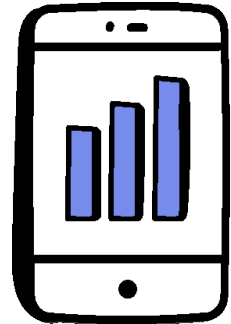
## Sensor Tower **Pathmatics Digital Advertising Insights**

**For those who need visibility  
into the digital ad ecosystem.**

Gain insight into: ads served, spend and impression estimates, SOV, and more across key channels, like: Facebook, Instagram, X (formerly Twitter), OTT, YouTube, display, video, and others.



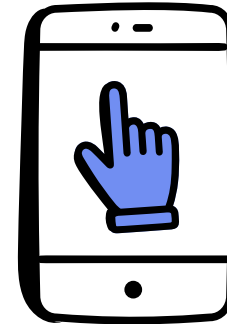
# Sensor Tower Solutions



## Sensor Tower **Gaming Insights**

**For those who need the deepest look into the mobile gaming ecosystem.**

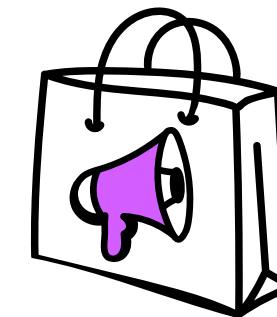
Enjoy insight into: downloads, revenue, RPD, and ARPDAU beyond the top-level category (Lifestyle & Puzzle) and can drill deeper into genres (Puzzle, Arcade, etc.) and sub-genres (Swap, Word, etc.).



## Sensor Tower **Advanced Usage Insights**

**For those who need the deepest look into app user engagement.**

Enjoy insight into: sessions per user; time spent; time of day; days used per time period; new, retained, resurrected, and churned user trends; and cohort usage overlap.



## Sensor Tower **Pathmatics Retail Media Insights**

**For those who need industry-first insight into on- and off-site retail media network investments**

Enjoy insight into: ad spend, media mix, share of wallet, impressions, and SOV for brands and products across retailers – gaining a coveted view into the co-branded digital ad ecosystem and retail media networks.

# Sensor Tower

## Overview & Methodology

This report provides an in-depth analysis of the short drama app market across the App Store and Google Play in 2025. It explores recent and emerging trends in global user spending and downloads, offering market-level insights into monetisation, user growth, and competitive positioning across key regions. The report highlights top-performing and fastest-growing apps by revenue and downloads, with a focus on markets such as the U.S., Japan, South Korea, Southeast Asia, and Latin America. It also uncovers the key success factors behind breakout apps like DramaWave in their global expansion.

### Notes on Revenue and Download Estimates

Sensor Tower's revenue data is based on in-app purchase (IAP) estimates from App Store and Google Play, excluding ad monetisation, revenue from third-party Android stores or direct payments made via official brand websites or other alternative payment channels. Unless otherwise specified as net revenue, all revenue figures refer to gross revenue (i.e. before platform fees are deducted).

Sensor Tower's download data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and downloads from third-party Android stores. Google Play is not available in Mainland China.





# Agenda

Overview & Methodology	06
Global Overview of the Short Drama App Market	08
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Case Study: DramaWave	17
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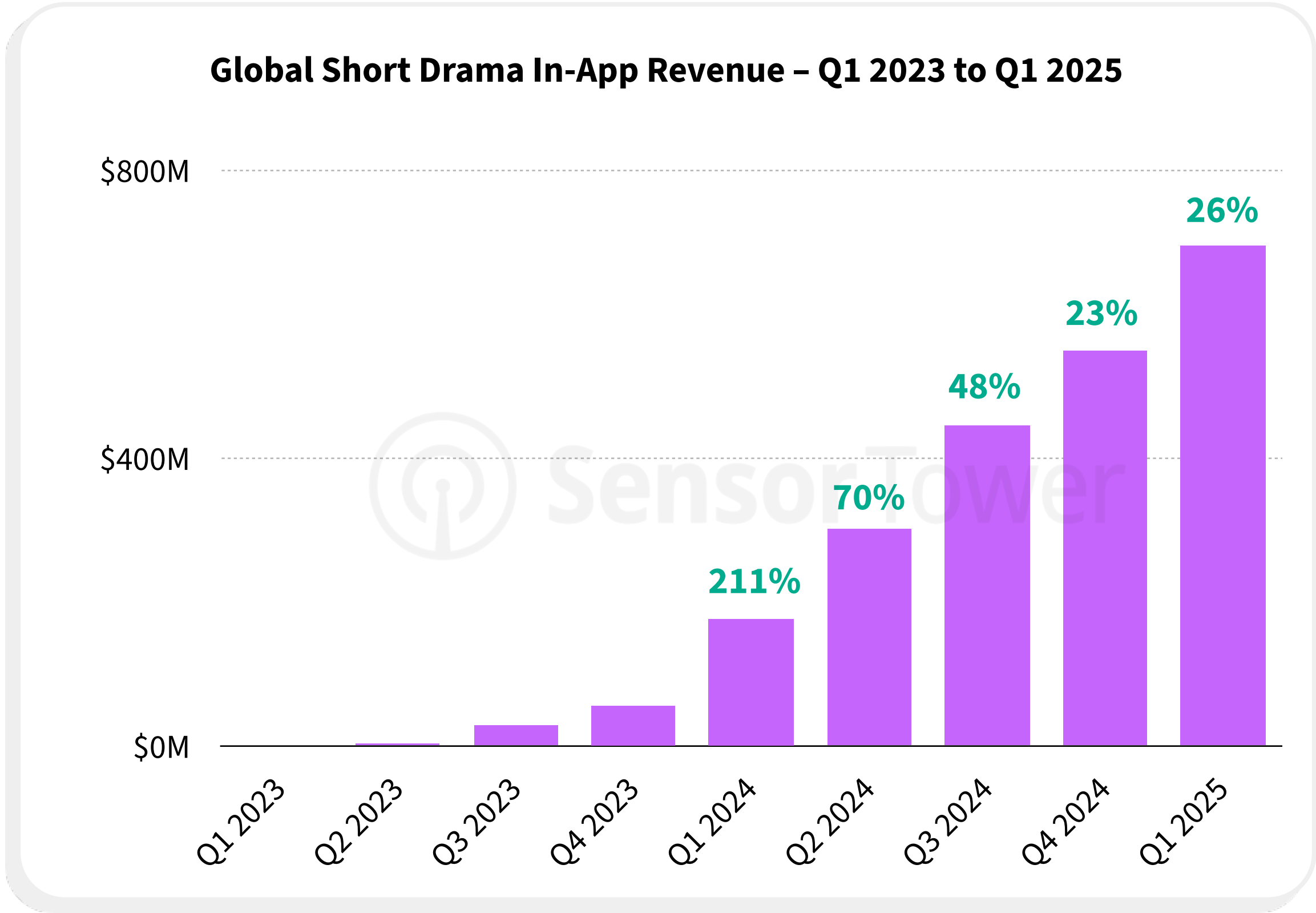
# Global Overview of the Short Drama App Market



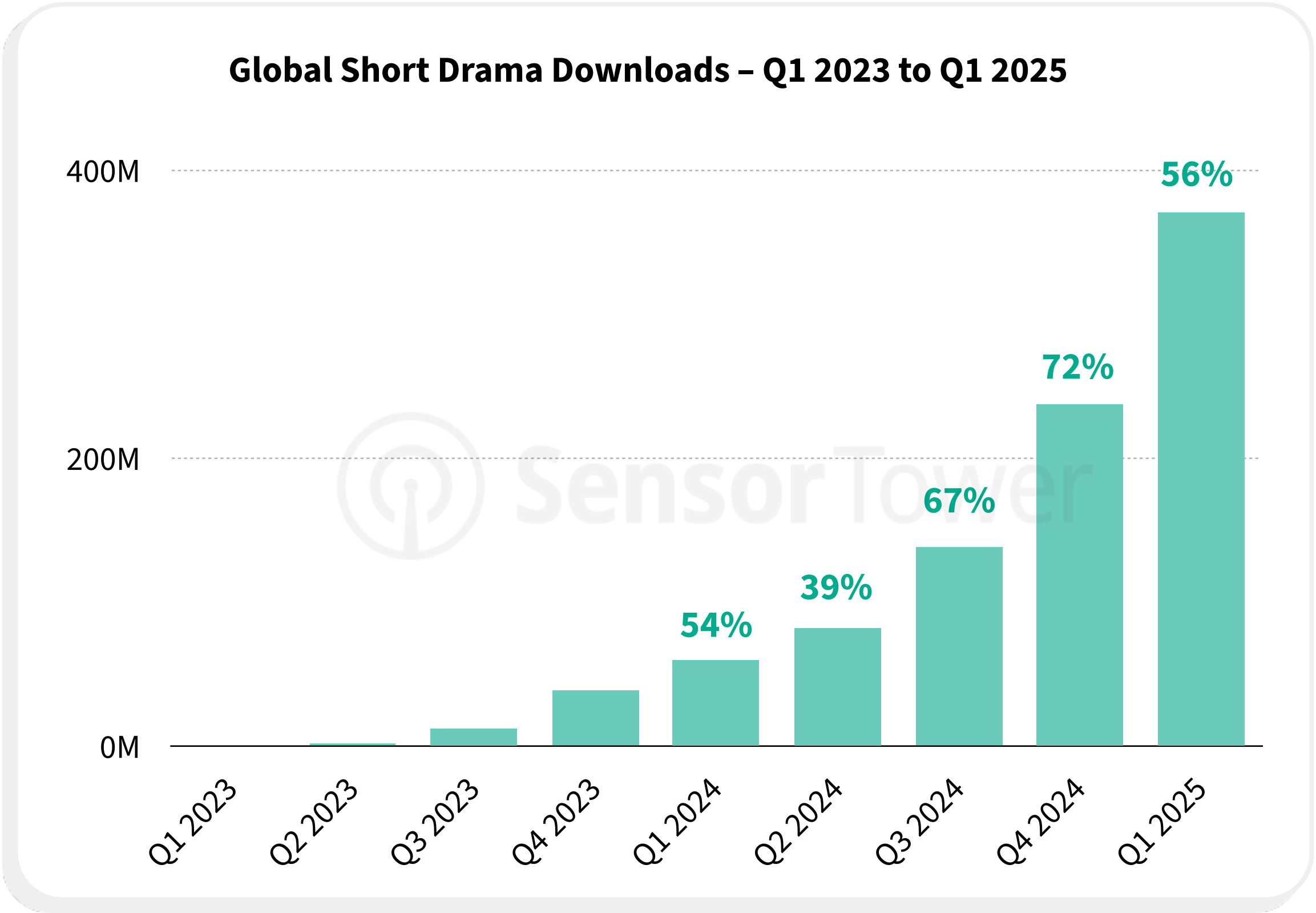
# Global Short Drama App Revenue Reached ~\$700M in Q1 2025 – Nearly 4x Higher than Q1 2024

**Source:** Sensor Tower App Performance Insights

**Note:** Sensor Tower's revenue data is based on in-app purchase (IAP) estimates from App Store and Google Play, excluding ad monetisation, revenue from third-party Android stores or direct payments made via official brand websites or other alternative payment channels. Unless otherwise specified as net revenue, all revenue figures refer to gross revenue (i.e. before platform fees are deducted). Sensor Tower's download data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and downloads from third-party Android stores. Google Play is not available in Mainland China.



Since the start of 2024, in-app revenue of short drama apps has experienced rapid growth globally. Quarterly revenue rose from USD \$178 million in Q1 2024 to nearly USD \$700 million in Q1 2025 – a 3x increase year-on-year. Cumulative revenue from Q1 2023 to Q1 2025 reached USD \$2.3 billion.

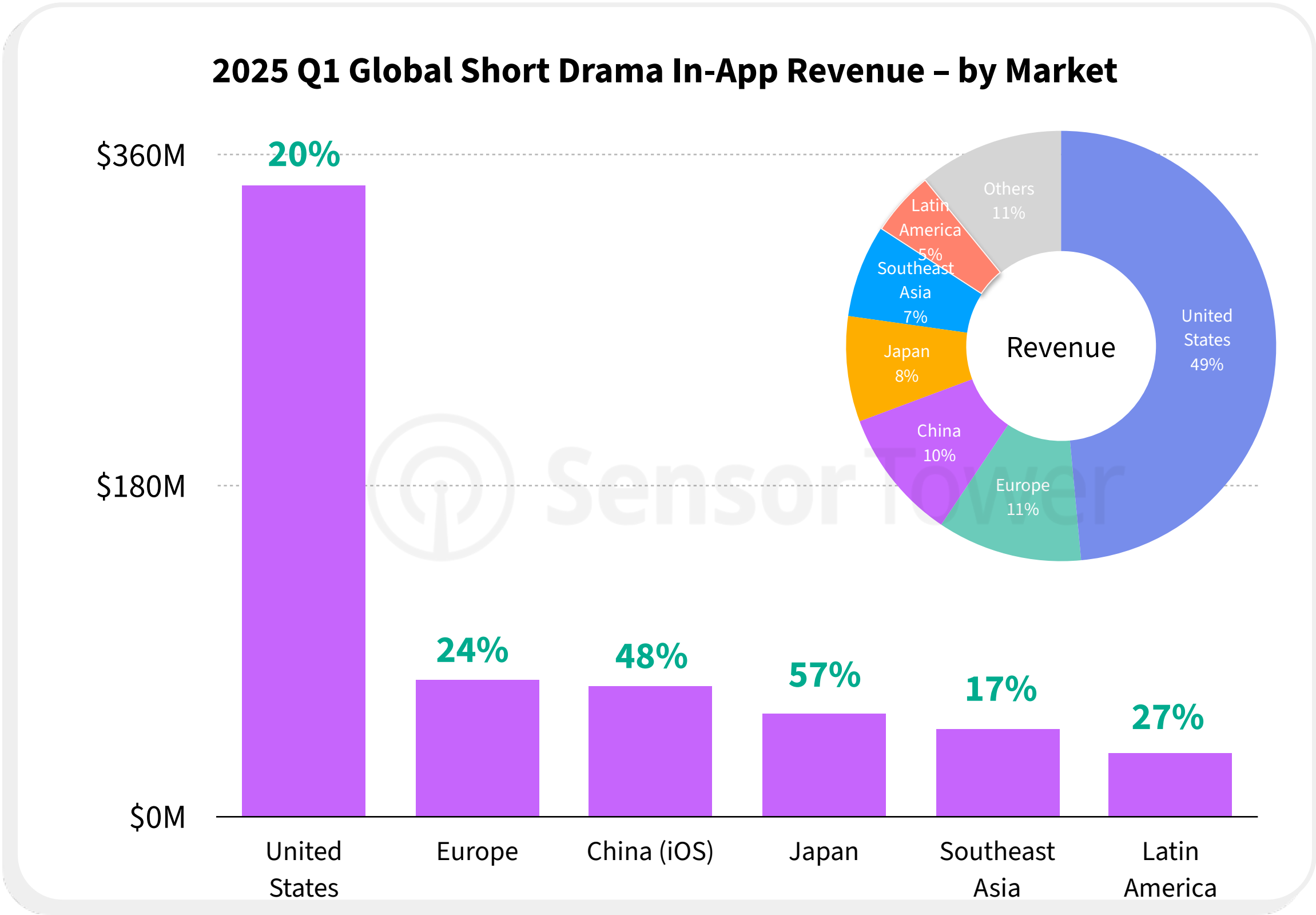


Global downloads of short drama apps also experienced significant growth. In Q1 2025, total downloads surpassed 370 million, 6.2x higher than Q1 2024. Cumulative downloads from Q1 2023 to Q1 2025 reached nearly 9.5 million.

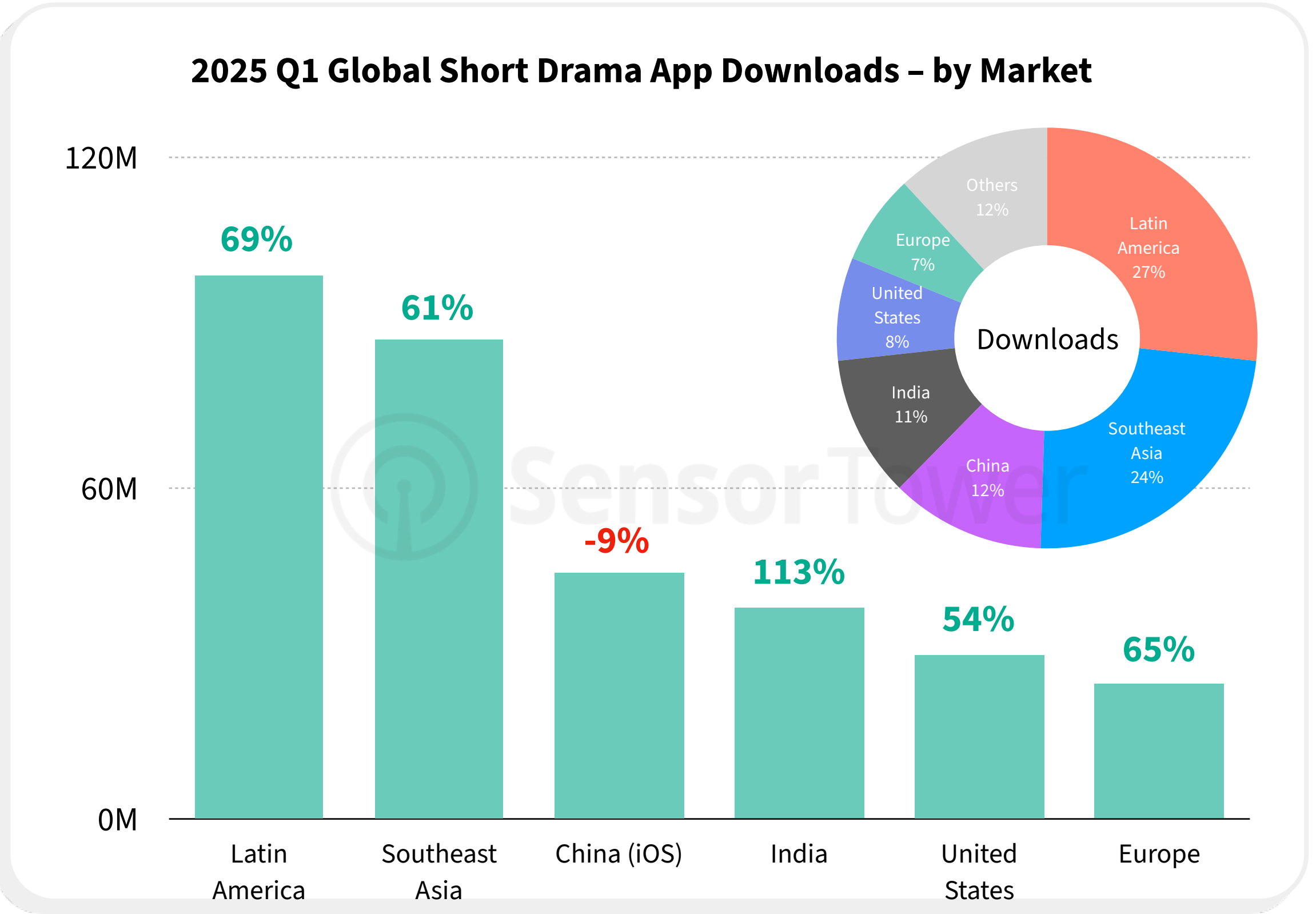
# The U.S Contributed Nearly 50% of Global Short Drama App Revenue, While LATAM and Southeast Asia Accounted for Over 50% of Global Downloads

**Source:** Sensor Tower App Performance Insights

**Note:** Sensor Tower's revenue data is based on in-app purchase (IAP) estimates from App Store and Google Play, excluding ad monetisation, revenue from third-party Android stores or direct payments made via official brand websites or other alternative payment channels. Unless otherwise specified as net revenue, all revenue figures refer to gross revenue (i.e. before platform fees are deducted). Sensor Tower's download data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and downloads from third-party Android stores. Google Play is not available in Mainland China.



The U.S. continues to be the top grossing market for short drama apps, experiencing a quarter-on-quarter growth of 20% in Q1 2025, nearing USD \$350 million. This figure accounts for 49% of the total revenue generated by short drama apps worldwide. The Chinese iOS market and the Japan market also experienced substantial growth, with revenue increasing 48% and 57% quarter-on-quarter, respectively.



As short drama apps gain popularity, LATAM, Southeast Asia, India, the U.S. and Europe have seen significant growth in downloads. In particular, the LATAM market experienced a remarkable quarter-on-quarter increase of 60%, reaching nearly 100 million installs. The Southeast Asia market followed closely with a 61% quarter-on-quarter rise, reaching nearly 87 million downloads (excluding third-party Android app stores).

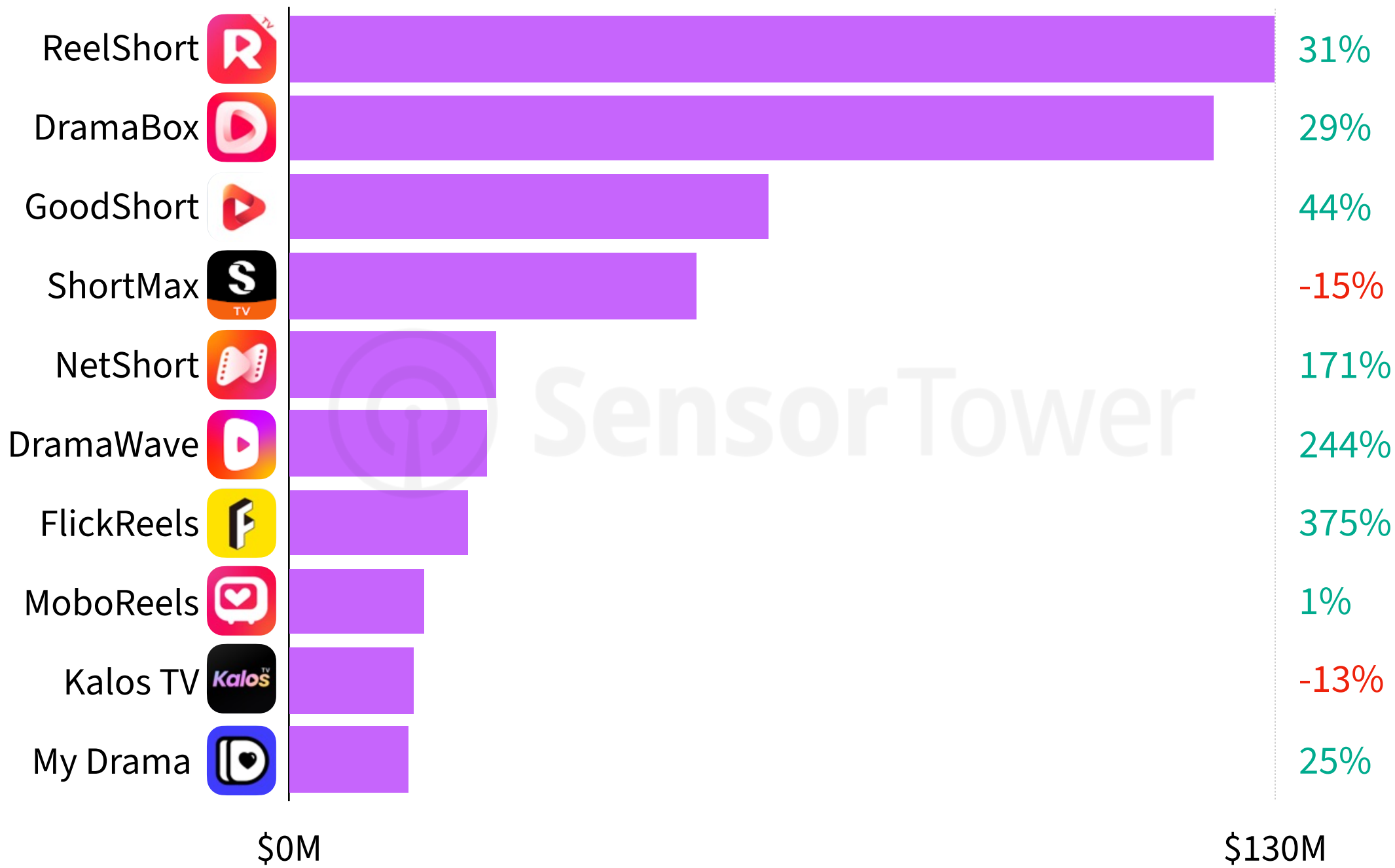


# ReelShort and DramaBox Lead the Pack, While Newcomers like DramaWave and FlickReels See Explosive Growth

Source: Sensor Tower App Performance Insights

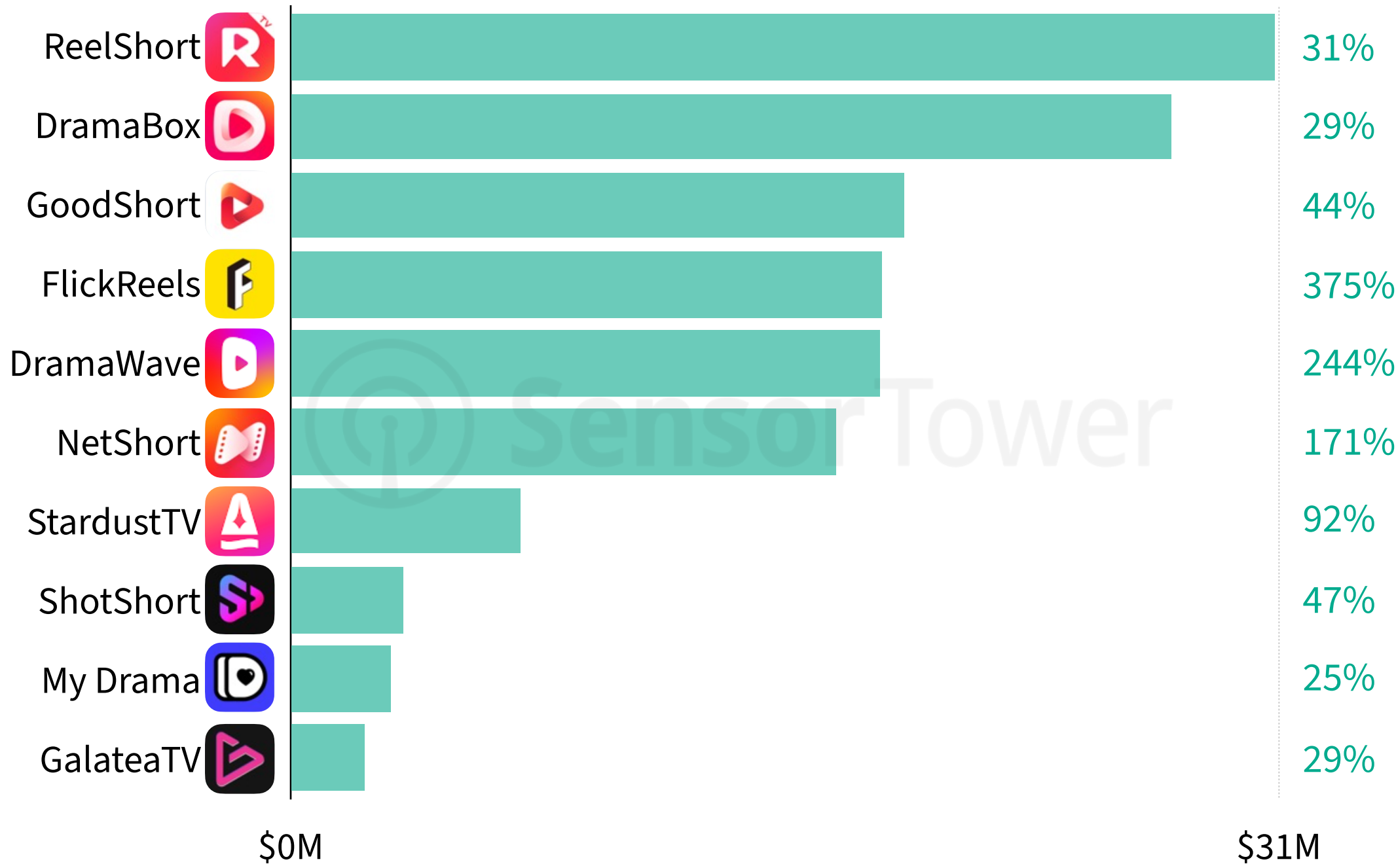
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2025 Q1 Top Short Drama Apps by In-App Revenue



ReelShort and DramaBox led short drama app monetisation in Q1 2025, with in-app revenues growing 31% and 29% quarter-on-quarter respectively. This growth resulted in revenues of USD \$130 million and USD \$120 million respectively, positioning them as the leading apps in both revenue and revenue growth rankings. As of March 2025, their cumulative global revenues reached USD \$490 million and USD \$450 million respectively.

2025 Q1 Top Short Drama Apps by In-App Revenue Growth



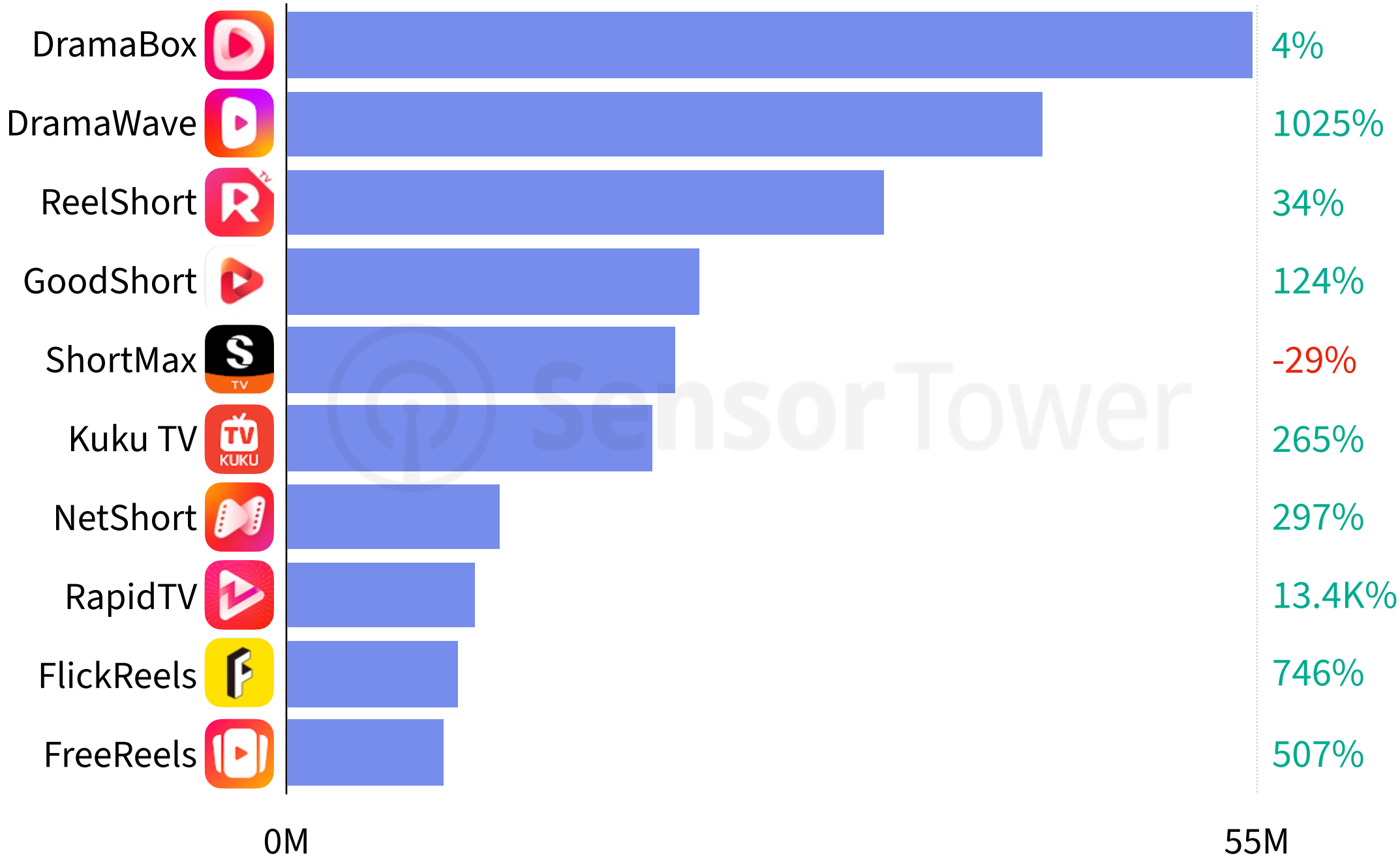
FlickReels saw a breakout quarter with in-app revenue surging 3.75x quarter-on-quarter, making it the 7th highest grossing short drama app in terms of revenue and 4th in revenue growth. Several new short drama apps that launched in the second half of 2024 – including NetShort, DramaWave and FlickReels – have demonstrated remarkable revenue growth and now rank among the global top 10 for in-app revenue.

# DramaWave Downloads Soared Over 10× QoQ in Q1 2025, Topping the Global Short Drama App Growth Chart

Source: Sensor Tower App Performance Insights

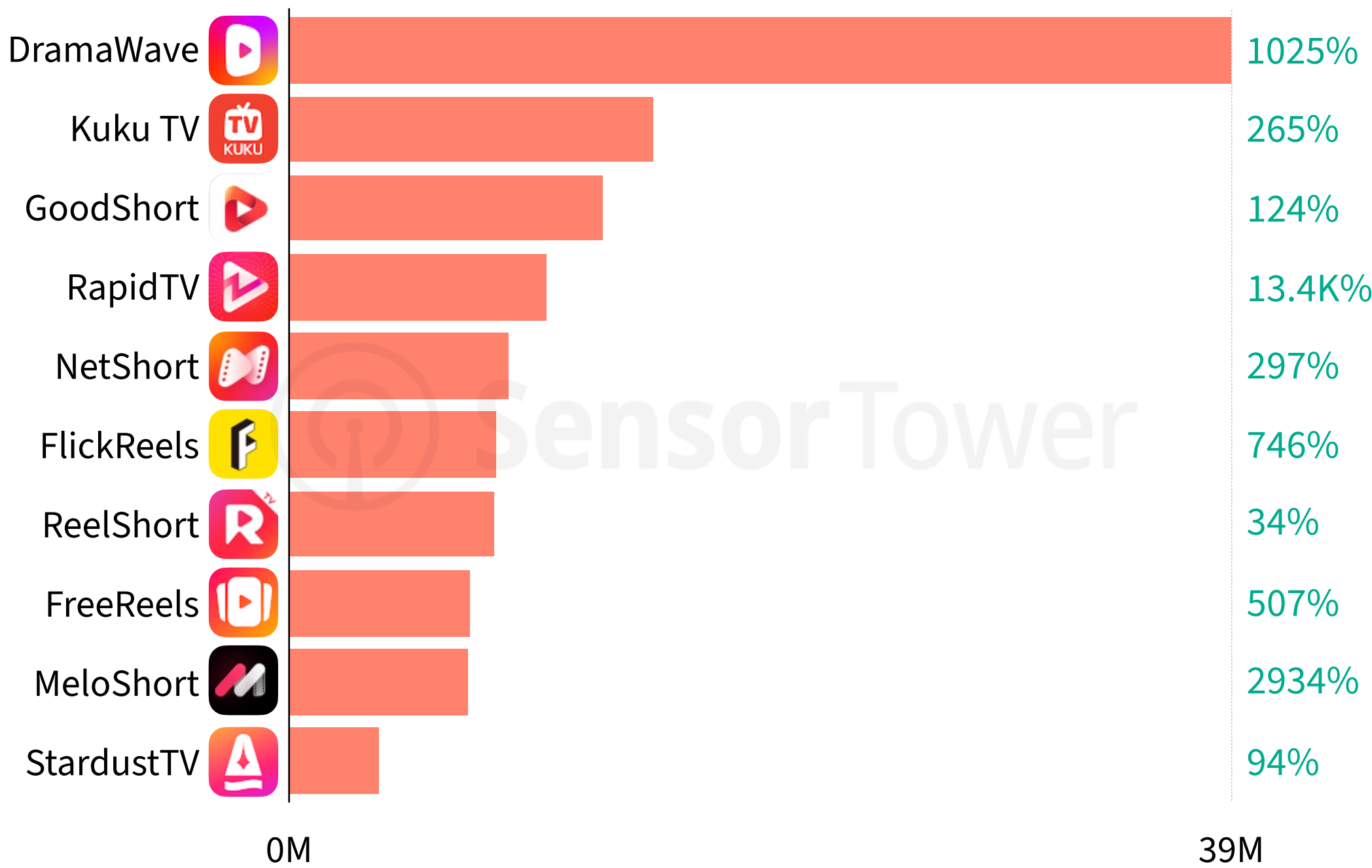
Note: Sensor Tower's download data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and downloads from third-party Android stores. Google Play is not available in Mainland China.

2025 Q1 Top Short Drama Apps by Downloads



DramaBox maintained steady growth in Southeast Asia and LATAM, reaching 55 million installs in Q1 2025 and securing the #1 spot in short drama app downloads. Meanwhile, DramaWave experienced a remarkable increase in downloads in Q1 2025, surging over 10x to reach a total of 43 million downloads. This growth has positioned DramaWave at #1 of the downloads growth ranking and #2 in downloads ranking globally.

2025 Q1 Top Short Drama Apps by Downloads Growth



In Q1 2025, short drama apps such as Kuku TV, RapidTV, NetShort, FlickReels, FreeReels, MeloShort and StardustTV showed significant download growth, quickly emerging from a competitive market and establishing their presence among the fastest-growing short drama apps globally.




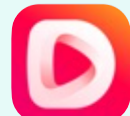
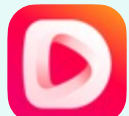
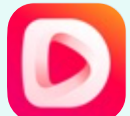
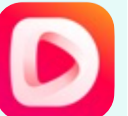






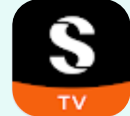









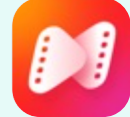
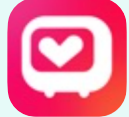



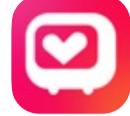







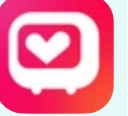









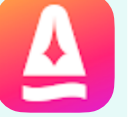




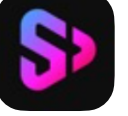


# Top Short Drama Apps in Overseas Markets

# Q1 2025 Top Short Drama Apps by In-App Revenue

Source: Sensor Tower App Performance Insights


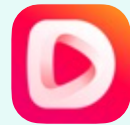
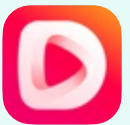
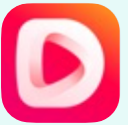

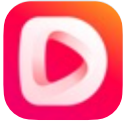



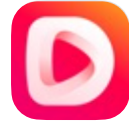

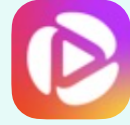










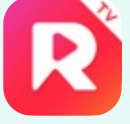
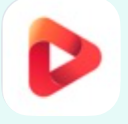
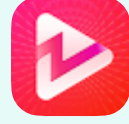
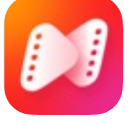
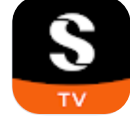
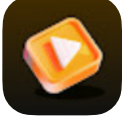

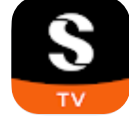






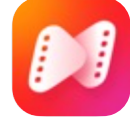
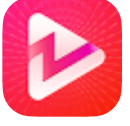


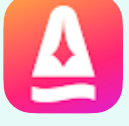
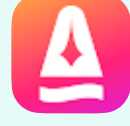
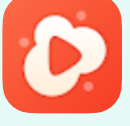
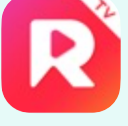
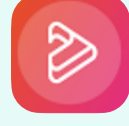
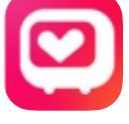
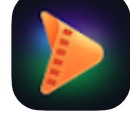


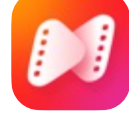
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United States			Japan			South Korea			Southeast Asia			Latin America		
Rank	Logo	App & Publisher	Rank	Logo	Advertiser	Rank	Logo	Advertiser	Rank	Logo	Advertiser	Rank	Logo	Advertiser
1		ReelShort	1		DramaBox	1		DramaBox	1		DramaBox	1		DramaBox
2		DramaBox	2		GoodShort	2		ShortMax	2		ShortMax	2		ReelShort
3		GoodShort	3		ShortMax	3		ReelShort	3		DramaWave	3		GoodShort
4		ShortMax	4		ReelShort	4		FlickReels	4		GoodShort	4		ShortMax
5		FlickReels	5		NetShort	5		MoboReels	5		NetShort	5		DramaWave
6		NetShort	6		MoboReels	6		NetShort	6		ReelShort	6		NetShort
7		Dramawave	7		FlickReels	7		StardustTV	7		StardustTV	7		MoboReels
8		Kalos TV	8		StardustTV	8		GoodShort	8		FlickReels	8		My Drama
9		MiniShorts	9		DramaWave	9		DramaWave	9		Kalos TV	9		StardustTV
10		My Drama	10		ShotShort	10		ShotShort	10		ShotShort	10		ShotShort

# Q1 2025 Top Short Drama Apps by Downloads

Source: Sensor Tower App Performance Insights

Note: Sensor Tower's download data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and downloads from third-party Android stores. Google Play is not available in Mainland China.



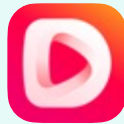
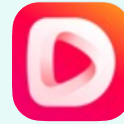
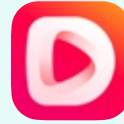



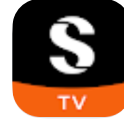



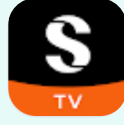




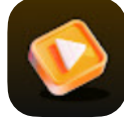

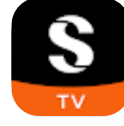

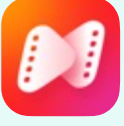

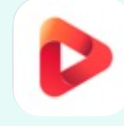
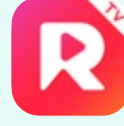
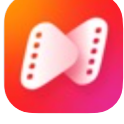

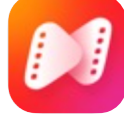
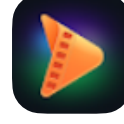
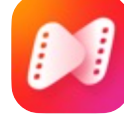

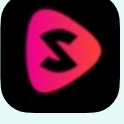
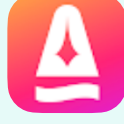

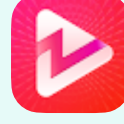
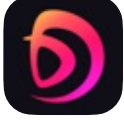



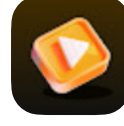


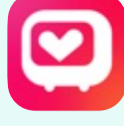
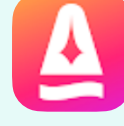
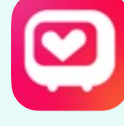



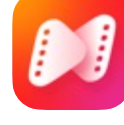
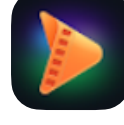
United States			Japan			South Korea			Southeast Asia			Latin America		
Rank	Logo	App & Publisher	Rank	Logo	Advertiser	Rank	Logo	Advertiser	Rank	Logo	Advertiser	Rank	Logo	Advertiser
1		ReelShort	1		DramaBox	1		DramaBox	1		DramaBox	1		DramaWave
2		DramaBox	2		GoodShort	2		ShortMax	2		DramaWave	2		DramaBox
3		GoodShort	3		YuzuDrama	3		FlickReels	3		ShortMax	3		ReelShort
4		FlickReels	4		ReelShort	4		Micro Drama	4		FreeReels	4		GoodShort
5		DramaWave	5		DramaWave	5		ReelShort	5		GoodShort	5		RapidTV
6		NetShort	6		ShortMax	6		Short Reels	6		Melolo	6		ShortMax
7		ShortMax	7		FlickReels	7		Vigloo	7		Micro Drama	7		MeloShort
8		MeloShort	8		NetShort	8		RapidTV	8		RapidTV	8		FlickReels
9		StardustTV	9		StardustTV	9		Popcorn Drama	9		ReelShort	9		Swift Drama
10		MoboReels	10		Micro Drama	10		DramaWave	10		StardustTV	10		NetShort



# Q1 2025 Top Short Drama Apps by Monthly Active Users

Source: Sensor Tower App Performance Insights

Note: Sensor Tower’s monthly active user estimates are based on data from the App Store and Google Play. The figures do not include users from third-party Android marketplaces. Google Play is not available in mainland China.

United States			Japan			South Korea			Southeast Asia			Latin America		
Rank	Logo	App & Publisher	Rank	Logo	Advertiser	Rank	Logo	Advertiser	Rank	Logo	Advertiser	Rank	Logo	Advertiser
1		ReelShort	1		GoodShort	1		DramaBox	1		DramaBox	1		DramaBox
2		DramaBox	2		DramaBox	2		Micro Drama	2		ShortMax	2		GoodShort
3		GoodShort	3		ShortMax	3		ShortMax	3		Dramawave	3		Dramawave
4		ShortMax	4		YuzuDrama	4		Short Reels	4		FreeReels	4		ShortMax
5		Dramawave	5		NetShort	5		GoodShort	5		GoodShort	5		ReelShort
6		NetShort	6		StardustTV	6		NetShort	6		Micro Drama	6		NetShort
7		FlickReels	7		TopShort	7		StardustTV	7		MoboReels	7		RapidTV
8		DreameShort	8		BUMP	8		FlickReels	8		ReelShort	8		Short Reels
9		StardustTV	9		FlickReels	9		MoboReels	9		StardustTV	9		MoboReels
10		MiniShorts	10		Dramawave	10		Popcorn Drama	10		NetShort	10		Micro Drama

# Case Study: DramaWave





# DramaWave

SKYWORK AI PTE LTD

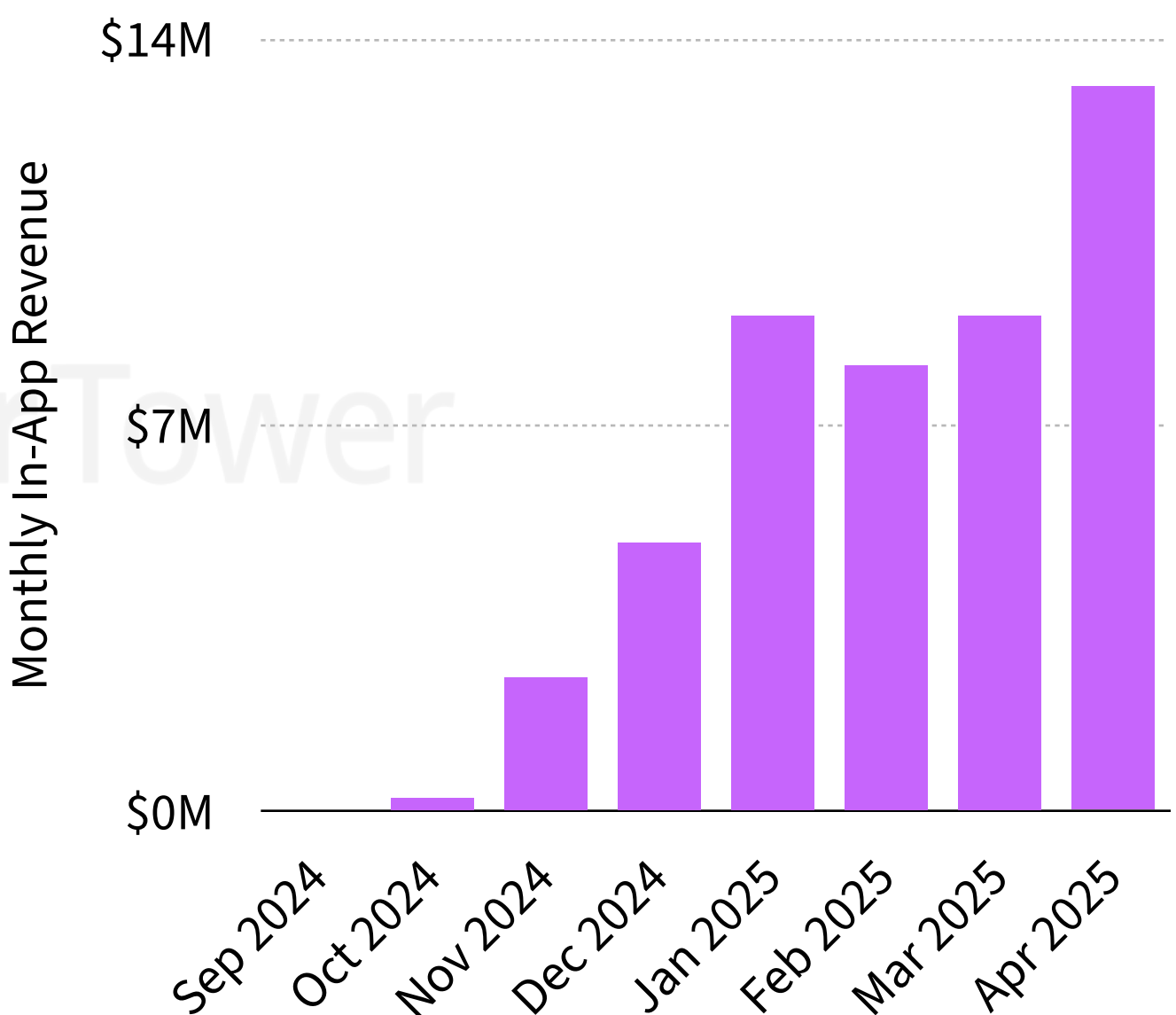
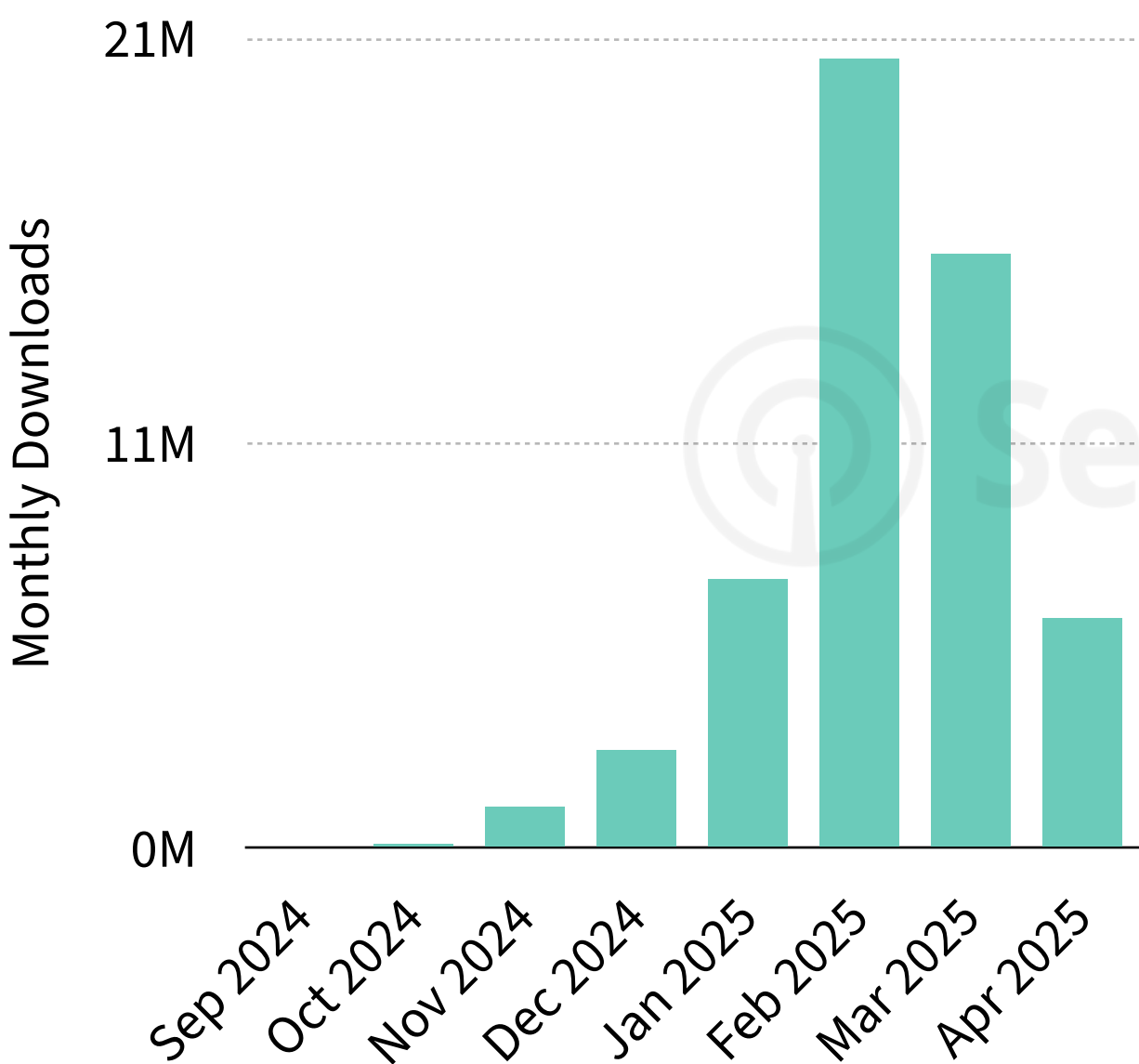
Developed by SKYWORK AI, DramaWave officially entered international markets in September 2024. By prioritising original content and strong localisation, DramaWave provides emotionally engaging short dramas with rich themes, high-quality visuals, multilingual subtitles and frequent content updates. These features have made it highly popular among global users – with the app holding a stellar 4.9 rating on the U.S. App Store.

According to Sensor Tower's App Performance Insights, as of April 2025, DramaWave has accumulated 53 million downloads and generated an in-app revenue of USD \$47 million globally.

## App Overview

- Release Date: September 2024
- Publisher: SKYWORK AI
- Cumulative Downloads: 53 million
- Cumulative In-App Revenue: \$47 million
- App Store Rating (U.S.): 4.9
- Monetisation Model: Ads, In-App Purchases, In-App Revenue
- Popular In-App Purchase Products:
  - Monthly VIP Membership: USD \$19.90/month
  - One-time Purchase Offer: USD \$9.99
  - Weekly VIP Membership: USD \$19.90/week

## Download & In-App Revenue Trends



Source: Sensor Tower App Performance Insights

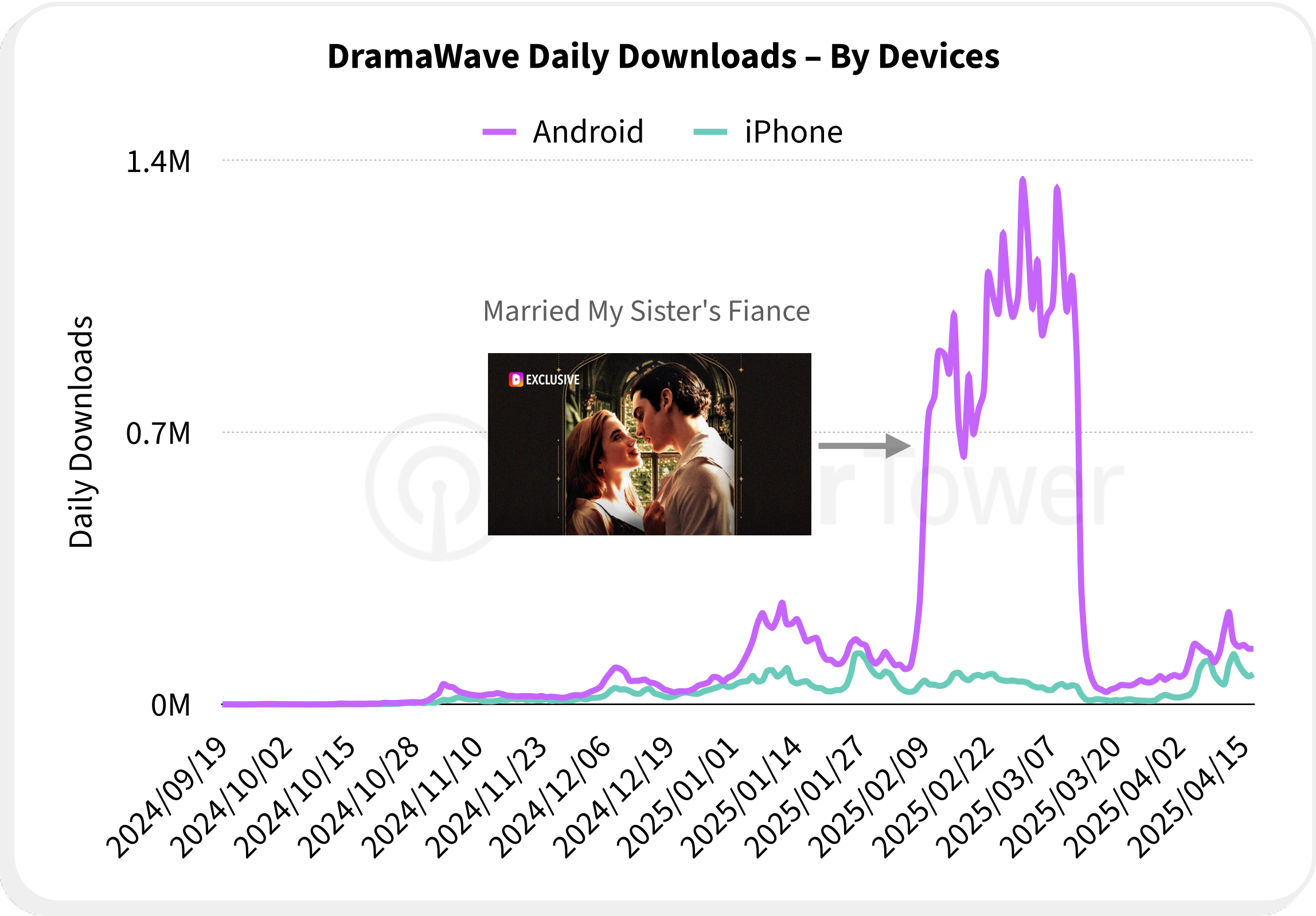
**Note:** Sensor Tower's revenue data is based on in-app purchase (IAP) estimates from App Store and Google Play, excluding ad monetisation, revenue from third-party Android stores or direct payments made via official brand websites or other alternative payment channels. Unless otherwise specified as net revenue, all revenue figures refer to gross revenue (i.e. before platform fees are deducted). Sensor Tower's download data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and downloads from third-party Android stores. Google Play is not available in Mainland China.



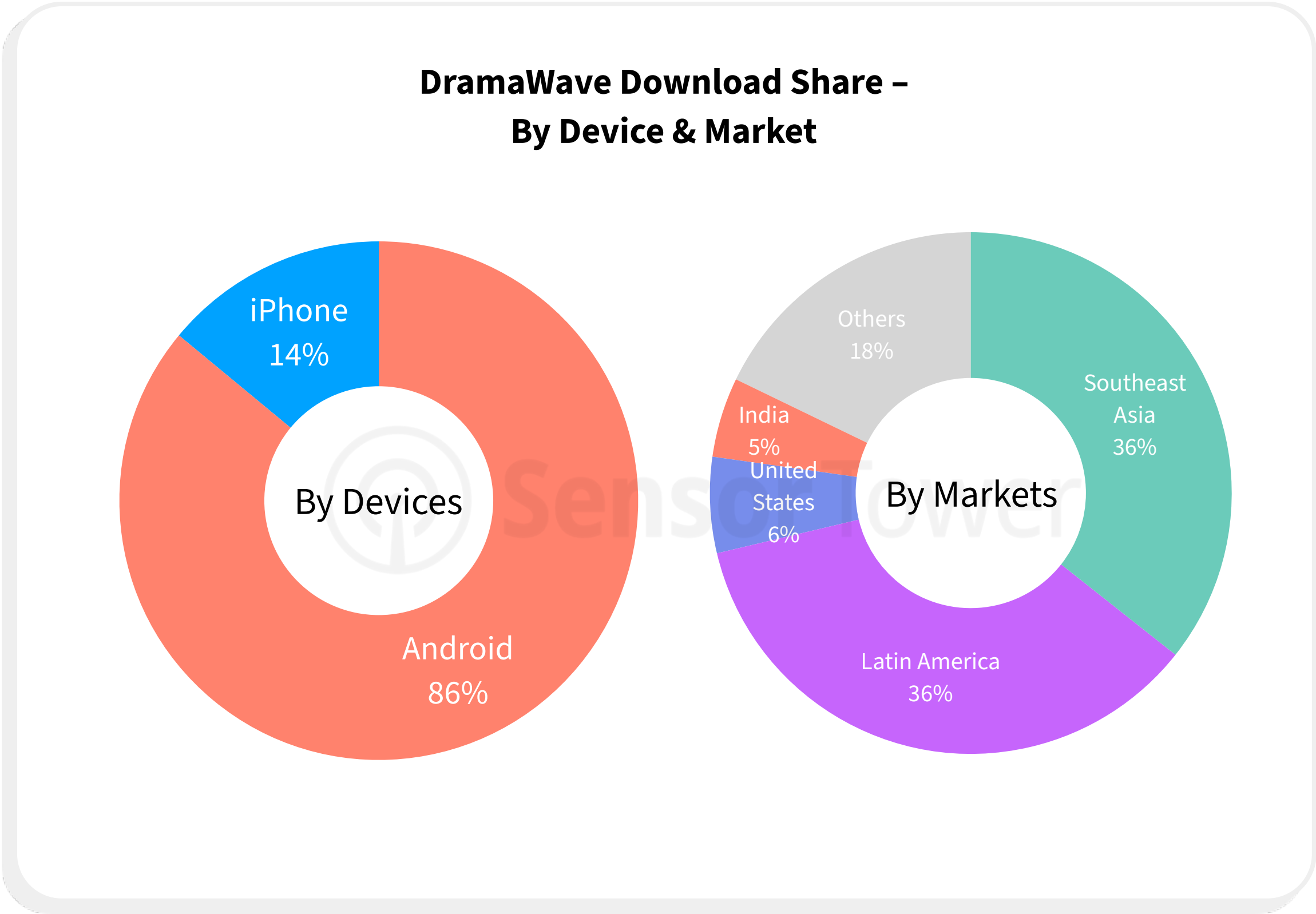
# DramaWave Gains Traction in Emerging Markets Like Southeast Asia and Latin America through Hit Short Dramas

Source: Sensor Tower App Performance Insights

Note: Sensor Tower's download data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and downloads from third-party Android stores. Google Play is not available in Mainland China.



In February, the launch of popular short dramas such as "Married My Sister's Fiancé" sparked a surge in market demand, propelling DramaWave into a phase of accelerated download growth. According to Sensor Tower's App Intelligence, DramaWave's downloads more than doubled month-over-month, surpassing 20 million (excluding third-party Android stores).

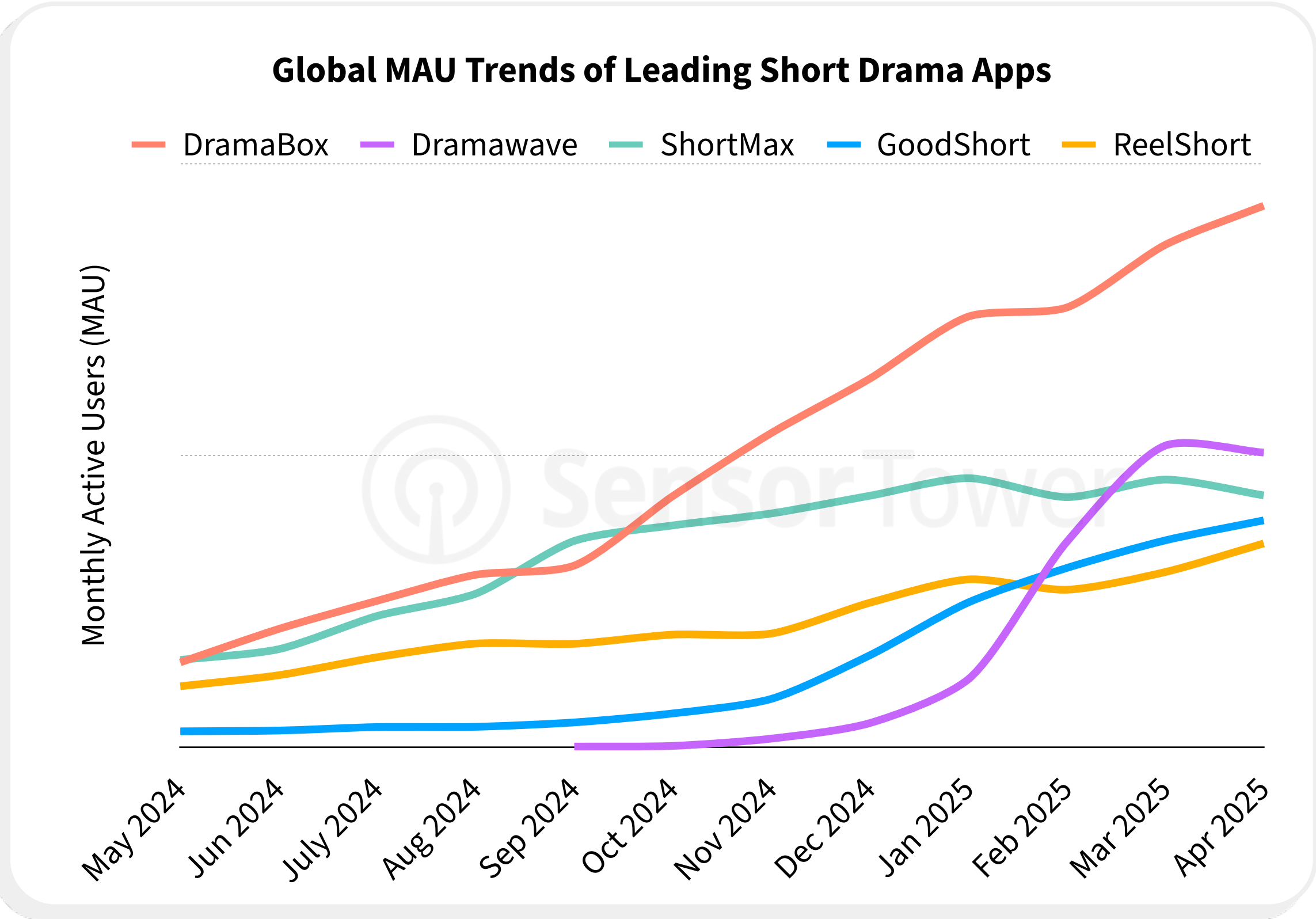


During its early growth phase, DramaWave focused its efforts on emerging markets like Southeast Asia and Latin America, which together contributed for 72% of its total downloads. Given the higher Android penetration in these regions, Android devices accounted for 86% of all DramaWave installs.

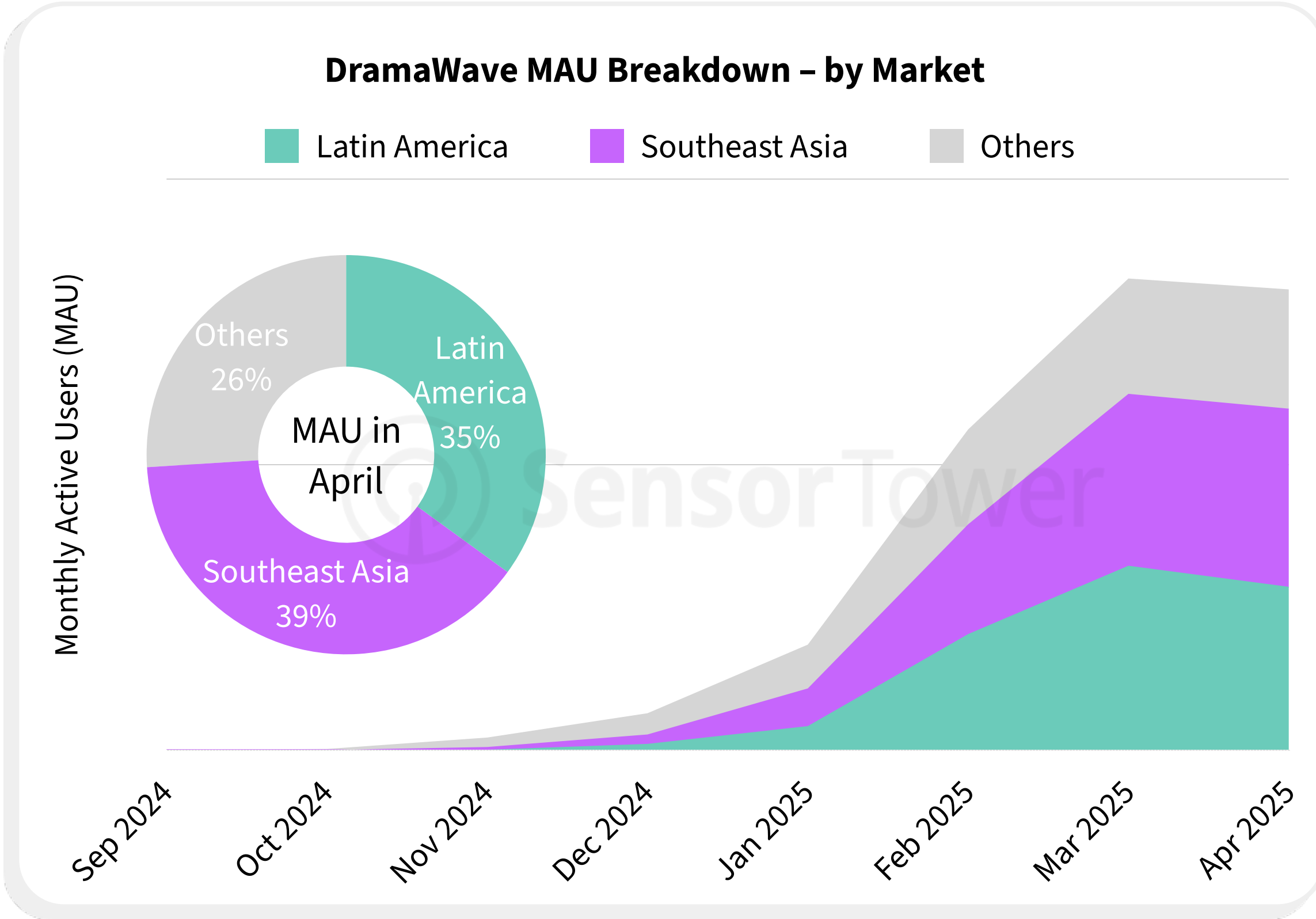
# DramaWave’s Monthly Active Users Surged, Reaching the #2 Spot Globally Among Short Drama Apps

Source: Sensor Tower App Performance Insights

Note: Sensor Tower's download data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and downloads from third-party Android stores. Google Play is not available in Mainland China.



DramaWave’s monthly active user base expanded rapidly thanks to strong growth in Latin America and Southeast Asia. By April 2025, DramaWave ranked #2 globally in monthly active users, just behind DramaBox.

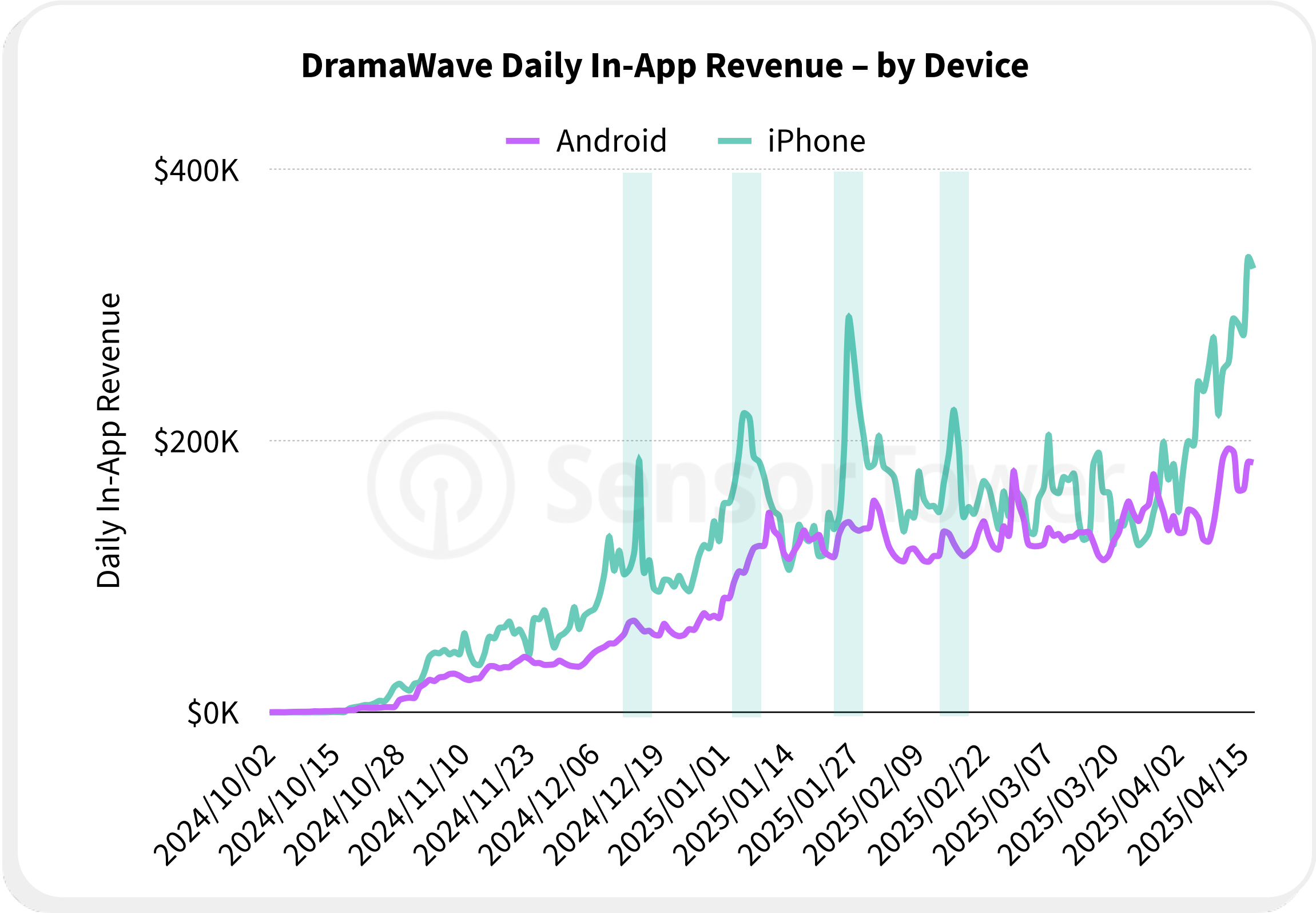


Growth in Southeast Asia and Latin America drove the surge in DramaWave's active users. In April 2025, 39% of MAUs came from Southeast Asia and 35% came from Latin America. This regional momentum significantly contributed to DramaWave's rise in global MAU rankings.

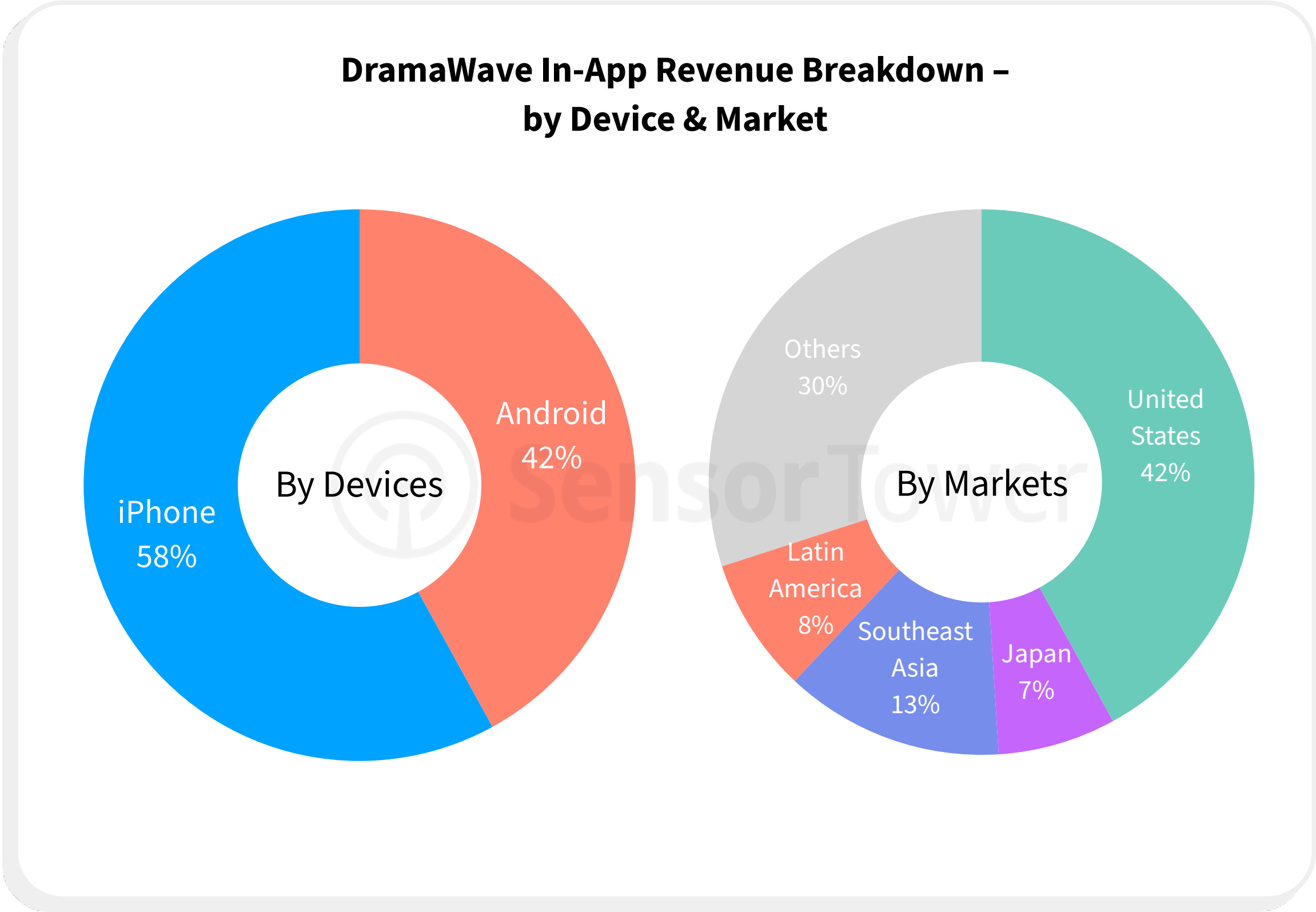
# DramaWave Sets New Daily Revenue Records, with the U.S. Market Contributing 42% of Total In-App Revenue

Source: Sensor Tower App Performance Insights

Note: Sensor Tower's revenue data is based on in-app purchase (IAP) estimates from App Store and Google Play, excluding ad monetisation, revenue from third-party Android stores or direct payments made via official brand websites or other alternative payment channels. Unless otherwise specified as net revenue, all revenue figures refer to gross revenue (i.e. before platform fees are deducted).



Fuelled by the launch of new short dramas and increased advertising spend, DramaWave continues to break daily revenue records. On April 16, daily in-app revenue for DramaWave surpassed USD \$520,000. Weekend spikes in in-app revenue are common, mainly driven by in-app promotions and increased user engagement during leisure time.

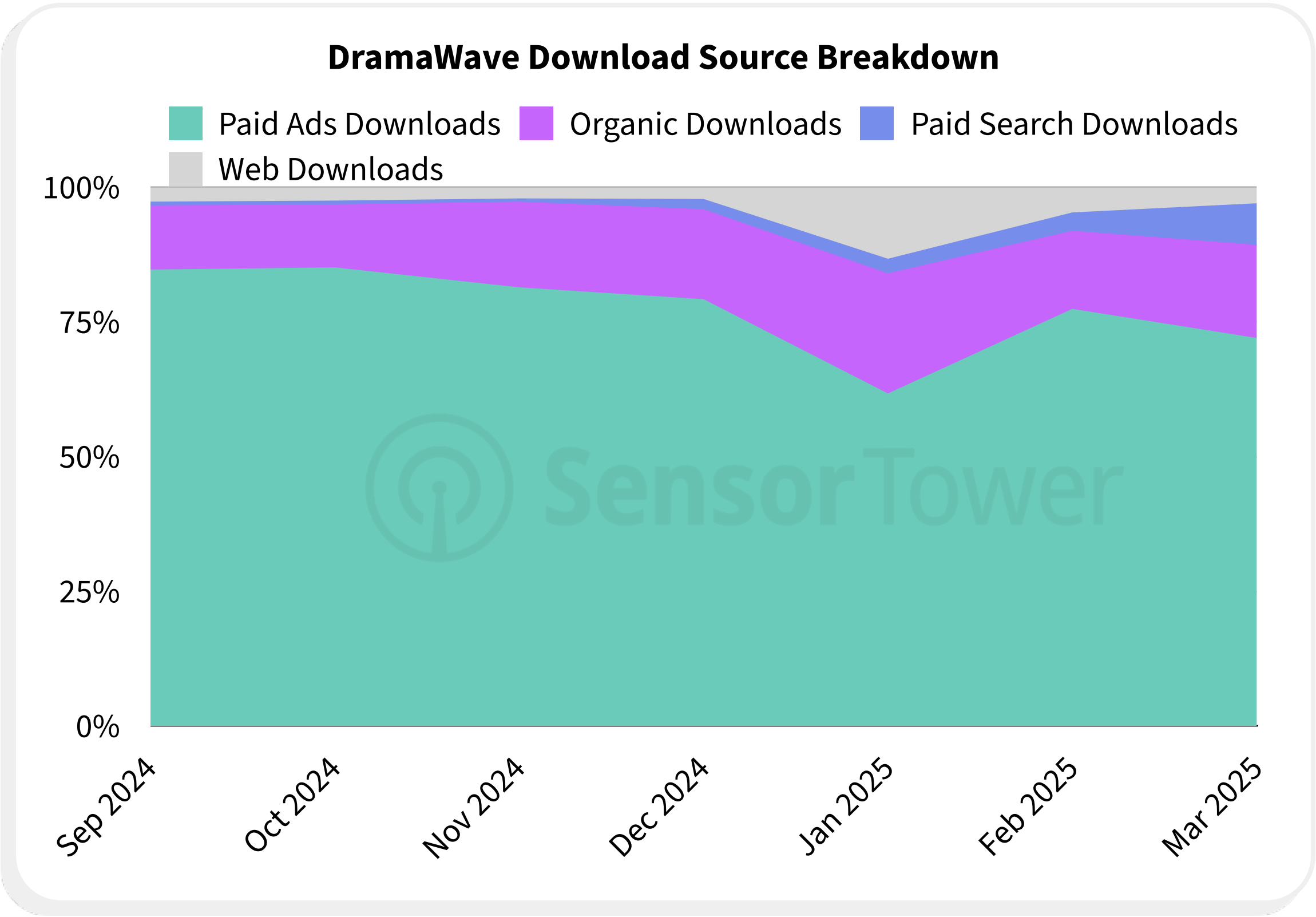


For DramaWave, iPhone users account for majority of in-app purchases at 58%, while Android users contributes 42%. From a market perspective, the U.S. alone drives 42% of DramaWave's total in-app revenue, followed by Southeast Asia (13%), Latin America (8%) and Japan (7%).

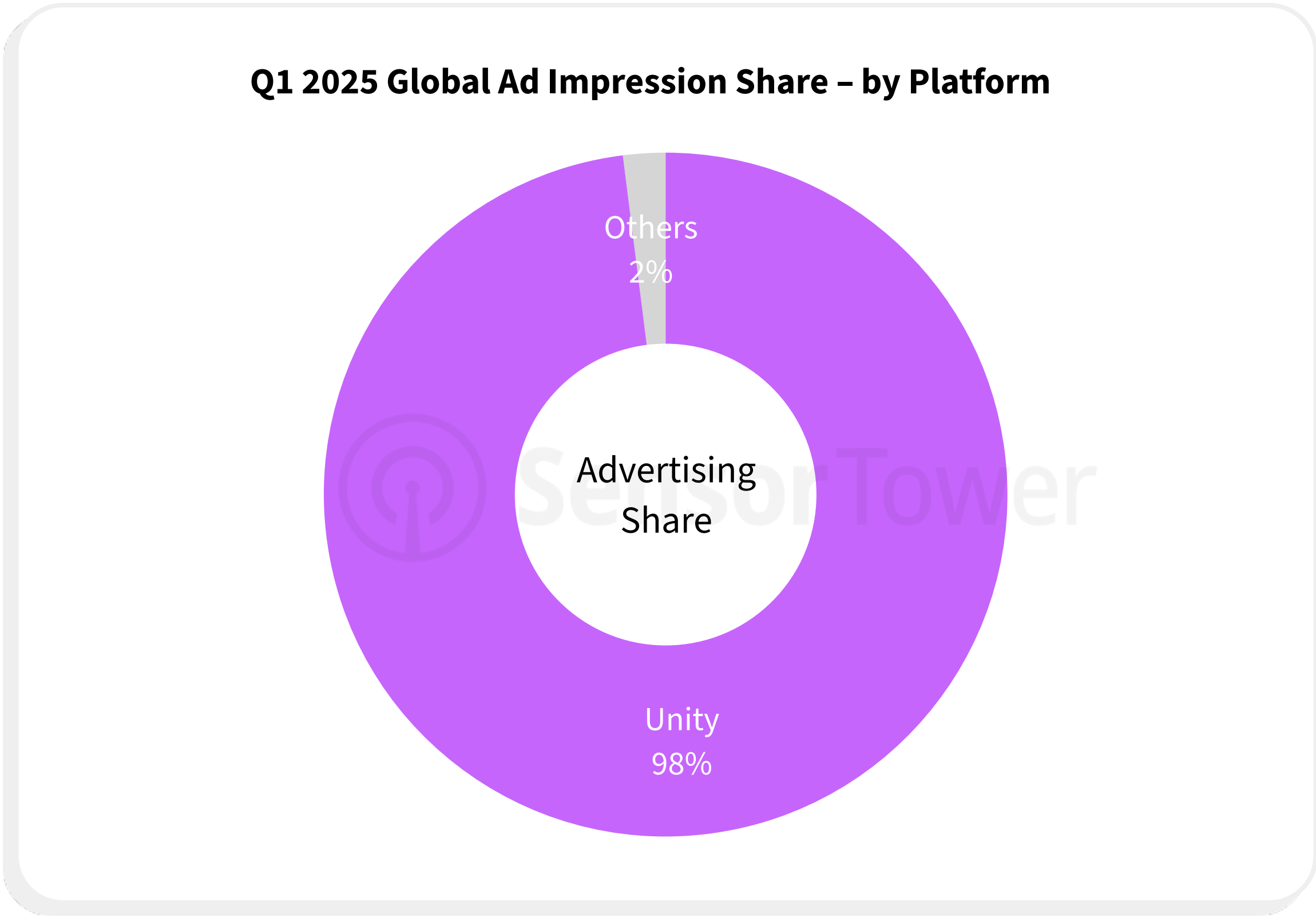


# Paid Ads Drove 73% of DramaWave's Downloads; Unity Was the Primary Ad Delivery Platform

Source: Sensor Tower App Performance Insights & Digital Advertising Insights



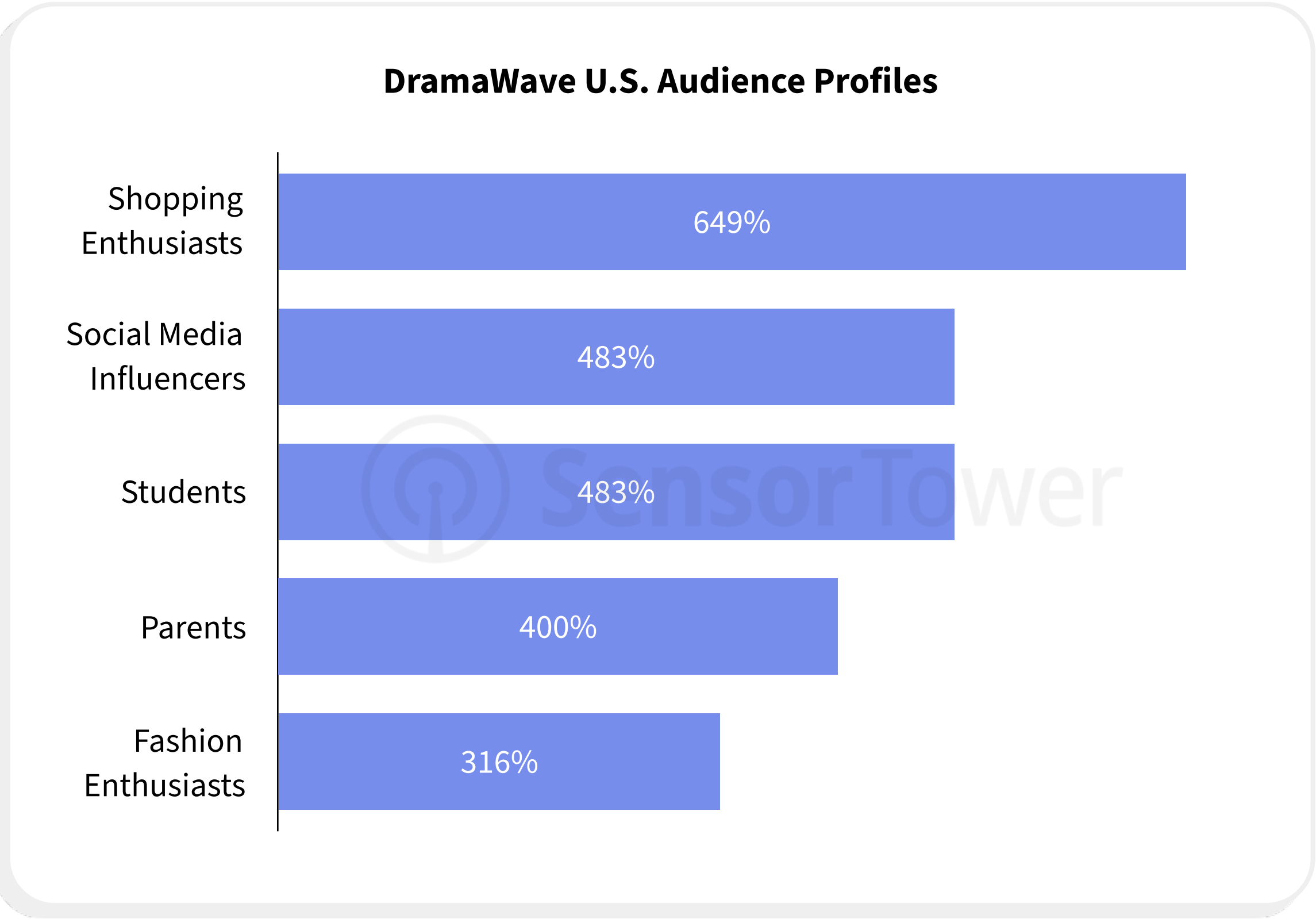
Paid advertising is the main driver of downloads for DramaWave. From September to December 2024, over 80% of the app downloads came from paid ads. As of March 2025, paid ad downloads accounted for more than 73% of total app installs.



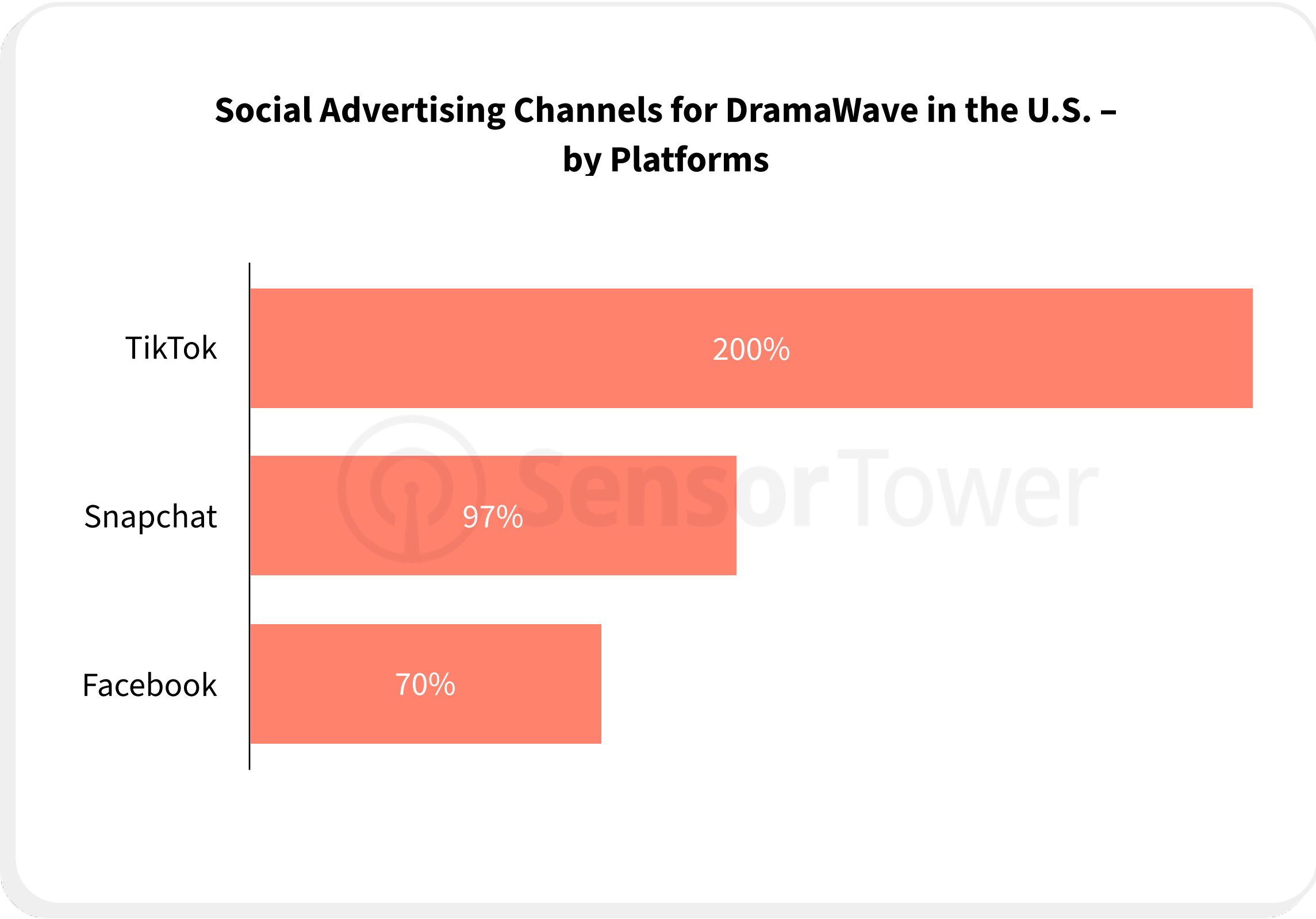
Unity was the dominant platform for DramaWave's user acquisition ads in Q1 2025, accounting for 98% of all global ad impressions. Only 2% of impressions came from other ad platforms.

# Social Media Fuelled DramaWave’s Rapid Rise: TikTok Emerged as the Key Platform

Source: Sensor Tower Audience Insights



DramaWave’s audience in the United States is 483% more likely to actively engage with social media compared to the general population. This underscores the pivotal role social platforms played in fueling the popularity of the app.



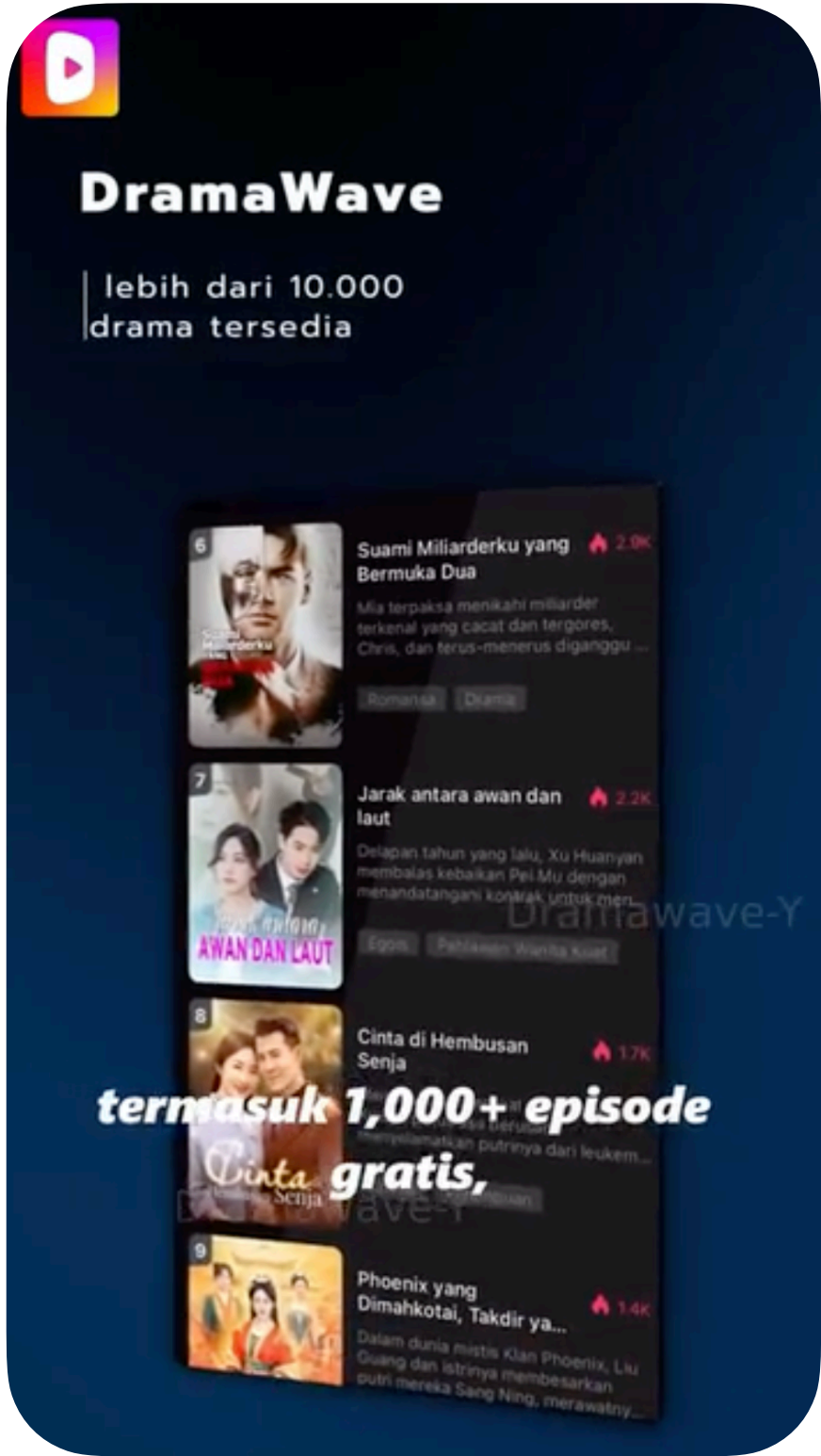
TikTok is DramaWave's primary social media platform for user engagement and ad exposure. Its official handle @dramawaveapp has over 1.7 million followers ([link](#)), ranking just behind ReelShort which has 1.8 million followers ([link](#)). In the U.S. market, DramaWave's ad impressions on TikTok are 200% higher than the average audience.



# DramaWave Uses Localised Subtitles in Ad Creatives to Expand Global Audience Reach

Source: Sensor Tower App Advertising Insights  
Note: Examples shown are top-performing DramaWave creatives across different markets in Q1 2025.

Indonesia



Mexico



Brazil



Japan



United States





# Key Takeaways

1

**By Q1 2025, global cumulative in-app revenue from short drama apps surpassed USD \$2.3 billion.**

Cumulative in-app revenue for short drama apps reached USD \$2.3 billion globally by Q1 2025 – nearly 8x higher than Q1 2024, with the U.S. contributing nearly 50% of total revenue. In the same quarter, Southeast Asia and Latin America saw surging download growth, accounting for over 51% of global installs together.

2

**ReelShort and DramaBox maintain their positions as leaders in the global short drama app market, while emerging players like DramaWave, NetShort and FlickReels are swiftly gaining traction.**

ReelShort and DramaBox reached USD \$521 million and USD \$470 million in global cumulative revenue respectively, maintaining their lead in the short drama app market globally. Meanwhile, DramaWave, NetShort and FlickReels emerged as breakout hits, quickly scaling in regional markets.

3

**DramaWave's downloads grew over 10x quarter-on-quarter in Q1 2025, topping the global download growth chart.**

Fuelled by dramatic original storylines, high-quality visuals, localised subtitles and a strong paid ad and social media strategy, DramaWave saw its downloads surge 10x in Q1 2025 – securing the #2 spot in total overseas downloads and topping the growth ranking.

# Sensor Tower

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# Sensor Tower

## About us

Sensor Tower is the leading solution for mobile marketers, app developers, and industry analysts who demand competitive insights on the mobile economy. Sensor Tower’s product suite includes: App Intelligence, Store Intelligence, Ad Intelligence, and Usage Intelligence.



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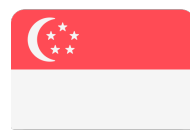
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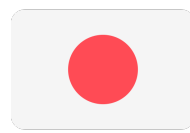
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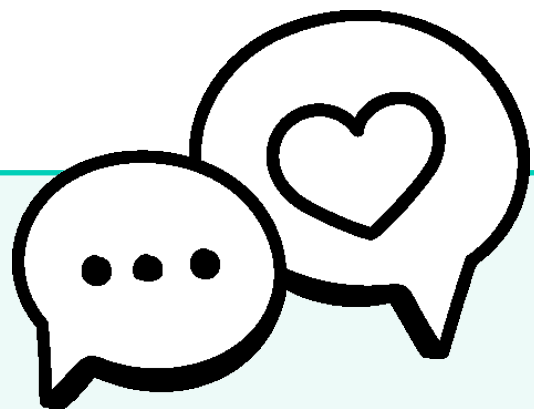


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