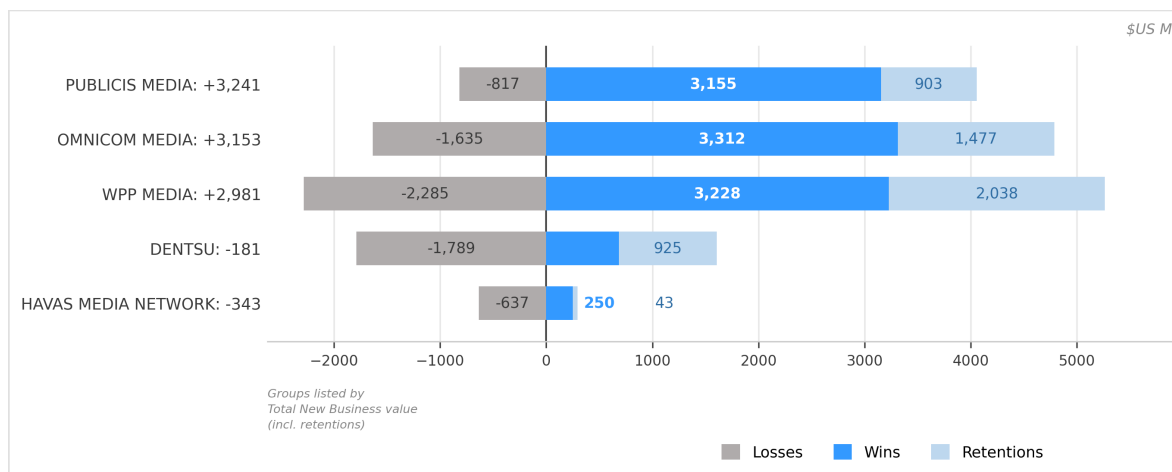


COMvergence H1 2026 Global New Business Results: Publicis Media Takes Top Spot

FRANCE — 21 SEPTEMBER 2026 — According to **COMvergence's** H1 2026 Global New Business Barometer (NBB), **Publicis Media** led the global Total New Business ranking among the Big 5 media agency groups, generating **\$3.24 billion** in total new business value, including \$903 million in retained billings, with group-level wins including *Adidas* (Greater China), *HP*, *Microsoft* and *Prada*. **Omnicom Media** followed in second place at **\$3.15 billion**, combining \$1.68 billion in net new-client wins with \$1.48 billion in retentions, and group-level clients including *Delta*, *IBM*, *On* and *Subway*. **WPP Media** ranked third at **\$2.98 billion**, anchored by the highest retained volume among the Big 5 (\$2.04 billion), including *Estée Lauder*, *Jaguar Land Rover*, *SC Johnson* and *Wendy's*. **Dentsu** (–\$181 million) and **Havas Media Network** (–\$343 million) posted negative totals for the half year, as losses outweighed wins and retentions.

H1 2026 TOTAL NEW BUSINESS RANKING (incl. retentions) – BIG 5 GLOBAL MEDIA AGENCY GROUPS



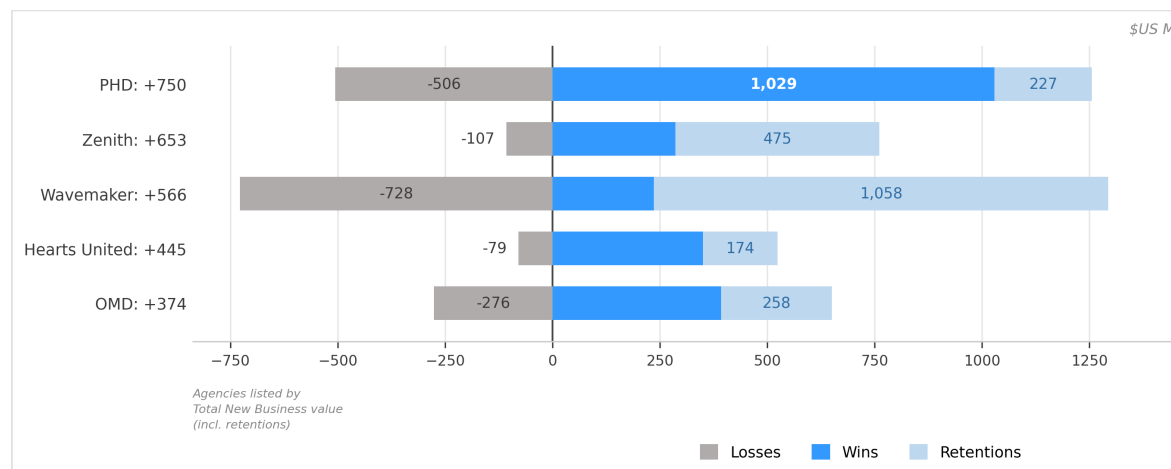
Olivier Gauthier, Founder and CEO COMvergence, commented:

"What we are seeing is a clear shift towards the consolidation of media business within bespoke, centralized solutions operated directly by the Big 5 holding groups, outside their global agency brands. In H1 2026, these solutions secured 26%—\$5.0 billion—of the \$19.2 billion in total reviewed media spend.

"WPP Media led this shift, assigning \$2.24 billion, or 69% of its total new wins, to its standalone group unit. Publicis Media followed with \$1.50 billion (47%), and Omnicom Media with \$1.11 billion (34%). Our H1 2026 New Business Barometer confirms that this model is becoming an increasingly significant force in the media landscape.

At the agency network level, **PHD** ranked #1 globally with a Total New Business Value of **\$750 million**, driven primarily by the \$440 million global *Adidas* account (excluding Greater China) and the multi-country retention of *Dyson* (\$164 million). **Zenith** ranked 2nd at \$653 million, boosted by the retention of *Reckitt* in the US (\$315 million) and the win of *L'Oréal* in India, while **Wavemaker** took 3rd position at \$566 million on the back of a \$650 million retention of *Huawei* in China. **Hearts United** — the network newly formed from the merger of Omnicom's Hearts & Science and Mediahub — debuted in 4th position with \$445 million. **OMD** completed the top five at \$374 million, aided by the win of *Aviva Group* in the UK.

H1 2026 TOTAL NEW BUSINESS RANKING (incl. retentions) – TOP 5 GLOBAL MEDIA AGENCY NETWORKS



In H1 2026, **COMvergence** assessed **1,970** media account moves and retentions across **49** countries, involving **1,070** advertisers and totaling **\$19.2 billion** in reviewed media spend (+9% vs. H1 2025). The **U.S.** accounted for 39% of total spend reviewed globally, followed by **China** at 15%. **Local**, single-country pitches represented 58% of spend reviewed, while **global and multi-country** reviews totaled \$8.1 billion, led by *Microsoft* (\$900M), *Estée Lauder* (\$885M), *Jaguar Land Rover* (\$585M), *Heineken* (\$540M), *Adidas* (\$530M) and *Dyson* (\$505M).

The overall **retention rate** reached **28%**, representing \$5.4 billion in retained billings. **Publicis Media** recorded the highest retention rate among the Big 5 at **52%**, followed by **Omnicom Media** and **WPP Media** (47% each), **Dentsu** (34%) and **Havas Media Network** (6%).

Independent agencies – more than 120 assessed in the report – captured **\$3.0 billion**, representing 16% of total spend reviewed, led by **Horizon Media** (\$540 million), **PMG** (\$355 million) and **Tinuiti** (\$300 million).

Sources

Account move information is derived from industry business press and company news websites which are then validated by all the agencies studied (a total of over 1,000 agencies across 50 countries cooperating with COMvergence).

About COMvergence:

COMvergence is a leading global research firm specializing in providing in-depth insights into the media and advertising landscape. Through its comprehensive reports, interactive tools and data analytics, COMvergence helps advertisers, media agencies, consulting firms, and AdTech companies to gain a clearer understanding of the competitive landscape, agency performance, and key industry trends.

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