Publishing Resource Guide

A Reference for U.S. Exporters

Third Edition
GREAT EXPECTATIONS

THE MYSTERIOUS FUTURE OF CONTENT

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This book made possible with support from

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We hope you find this guide helpful. Please do not hesitate to contact us directly if we can be of further assistance. We look forward to helping your business achieve its international goals!

Market Intelligence
- Analyze market potential and foreign competitors
- Obtain useful information on best prospects, financing, laws, and cultural issues
- Conduct background checks on Potential buyers and distributors

Business Matchmaking
- Connect with pre-screened potential partners
- Promote your product or service to prospective buyers at trade events worldwide
- Meet with international industry and government decision makers in your target market(s)

Trade Counseling
- Develop effective market entry and sales strategies
- Understand export documentation requirements and import regulations of foreign markets
- Navigate U.S. government export controls, compliance, and trade financing options

Commercial Diplomacy
- Overcome trade obstacles to successfully enter international markets
- Benefit from coordinated U.S. government engagement with foreign governments to protect U.S. business interests
- Access U.S. government trade advocacy for your foreign government procurement bids
Australia

Summary
The Australian publishing market is relatively small in comparison to other international markets but U.S. publishers should take advantage of the fact that Australia’s digital publishing is in its infancy stage. Digitalization is challenging Australia’s existing publishing business model, which presents an opportunity for U.S. publishers that already have the experience and competitive advantage.

According to the Australian Bureau of Statistics, the majority of Australian book sales (77%) are to book distributors and other retailers and the remaining 23% of sales were sold directly to consumers. An estimated $225 million worth of books were imported by Australian publishers in 2010. There is an increasing demand in e-books especially in the educational sector. Imports supply around 40 percent of the market while the local industry supplies sixty percent of the domestic market demand. According to a PricewaterhouseCoopers analysis, the value of trade book sales grew by an annual average of 4.8 percent from 2001 to 2010.

Consumers’ rate of purchasing devices such as e-Readers, tablets, smart phones, notebooks and computers are likely to continue influencing the size of the e-book market in Australia. The rate of growth in Australia’s book market is also influenced by the expected strength of the Australian economy.

Statistics
Capital: Canberra
Population: 21.7 million
GDP: USD 889.6 billion
Currency: Australian Dollar (AUD)
Language: English

Contact
office.sydney@trade.gov
Market Entry
Opportunities exist in the Australian market for U.S. publishers due to a variety of factors including internet access to the full range of English-language titles, the rise of e-books and new readers, interest in U.S. editions, and publishers’ strategic expansion in international sales, marketing and distribution. Factors impeding competitiveness include book availability and price.

Australia ranks highly for its enforcement of intellectual property rights. Australia is taking a strong stance in intellectual property rights laws and has extended copyright from 50 to 70 years. As Australia is starting to set standards for digital rights management (DRM), U.S. publishers must be aware of certain limitations and provisions. A goods and services tax is levied on taxable supplies of goods at a rate of 10 percent. There is an exception on GST tax for the educational book market. There is also the original customs duty on goods imported into Australia.

Key Suppliers
The Australian publishing industry is diverse with several thousands of publishers. Most of the leading publishers in Australia are subsidiaries of U.S., U.K. or European companies. These include Random House, HarperCollins, CCH, and McGraw-Hill Education. Kobo is extremely popular in Australia, carrying over 2.3 million e-books with customers in over 200 countries. There are few specialist book distributors operating in the Australian market and their distribution system is fragmented. Access to distribution systems can be a problem for smaller publishers, who often feel locked out of the national distribution system. In addition, booksellers do not enjoy consolidated services because the Australian market lacks specialist wholesalers. The result is lengthy delivery times and inefficiencies.

Australia remains a key market for Amazon. The online retail giant opened a local data center in Australia to target big business cloud computing and some think this may pave the way for Amazon’s shopping site to come to the country. In 2011, two local retail chains, Dick Smith Electronics and Big W, started to sell Amazon’s Kindle. In the past few years, some Australians have become frustrated over limited e-book availability due to publishers
setting geographical restrictions on e-books. Authors sell separate rights to publishers in different markets to maximize profits. When authors do not explicitly grant the publisher rights to sell in Australia, Amazon is not allowed to provide or sell those wide varieties of e-books.

**Barriers**

The Copyright Act 1968 limits foreign publishers in competing with Australian publishers to supply books to the Australian market. The Act makes copying and selling of copyright material without permission an infringement. Digital publishing has caused significant uncertainties; authors and publishers are concerned that lower priced e-books may undermine their income.

**Resources—Industry Contacts**

**Australian Publishers Association**
+61-2-9281-9788 • publishers.asn.au • office@publishers.asn.au

**Australian Customs and Border Protection**
+61-2-9313-3010 • customs.gov.au • information@customs.gov.au

**Book Industry Strategy Group**
+61-2-6213-7416 • books@innovation.gov.au

**Exisle Publishing**
+61-2-4998-3327 • exislepublishing.com.au

**Finch Publishing**
+61-2-9418-6247 • finch.com.au • info@finch.com.au
Austria

Summary
Austria has 1,479 publishing companies, 280 periodical publishers and 100 newspaper publishers in an industry structure composed primarily of small and mid-sized companies. There are 5,200 authors in Austria, with 400 of them working full-time. With 3.65 million private households, the book market in Austria generates annual sales of $2.5 billion. In comparison with the Austrian CPI, books became relatively cheaper in 2011. The average price of hard and softcover books, paperbacks and audio books totaled $18.97, $12.75, and $19.67, respectively.

### Household Spending on Published Materials, 2010

<table>
<thead>
<tr>
<th>Product Type</th>
<th>per Household (USD)</th>
<th>Total Sales (USD millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Books</td>
<td>174.57</td>
<td>637.17</td>
</tr>
<tr>
<td>Educational material &amp; textbooks</td>
<td>141.67</td>
<td>517.11</td>
</tr>
<tr>
<td>Newspapers &amp; magazines</td>
<td>375.54</td>
<td>1,370.72</td>
</tr>
<tr>
<td>Paper &amp; stationery</td>
<td>59.26</td>
<td>216.31</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>751.04</strong></td>
<td><strong>2,741.31</strong></td>
</tr>
</tbody>
</table>

Source: Branchen-Monitor Buch, Association of the Austrian Book Trade

### Statistics
- Capital: Vienna
- Population: 8.4 million
- GDP: USD 419 billion (2011)
- Currency: Euro (€)
- Language: German

### Contact
Manfred Weinschenk
Senior Commercial Specialist
manfred.weinschenk@trade.gov
43 (0) 1-313 39-2285
### Book Sales

<table>
<thead>
<tr>
<th>Year</th>
<th>Sales (USD millions)</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2004</td>
<td>999.91</td>
<td>-</td>
</tr>
<tr>
<td>2005</td>
<td>990.86</td>
<td>-0.9</td>
</tr>
<tr>
<td>2006</td>
<td>995.38</td>
<td>+0.5</td>
</tr>
<tr>
<td>2007</td>
<td>1,040.66</td>
<td>+4.5</td>
</tr>
<tr>
<td>2008</td>
<td>1,015.68</td>
<td>-2.4</td>
</tr>
<tr>
<td>2009</td>
<td>1,038.02</td>
<td>+2.2</td>
</tr>
<tr>
<td>2010</td>
<td>1,056.70</td>
<td>+1.8</td>
</tr>
</tbody>
</table>

Source: Branchen-Monitor Buch, Association of the Austrian Book Trade

Of the 7,764 individual new releases in Austria in 2010, 707 or just 9.1% were foreign or multilingual. The foreign publications were released in 25 languages, of which English had the largest share with 54.7%, with Slovenian ranking second with 4.6%. Of the 338 translated publications in Austria in 2010, 70% were in English, 7% in French, 4% in Slovenian and 14% in Swedish. (Source: Statistik der österreichischen Buchproduktion 2010, Association of the Austrian Book Trade)

### Market Entry

American publishing houses can approach Austrian booksellers by contacting an intermediary delivery company (please contact the U.S. Commercial in Austria for a detailed contact list), or by contacting a bookseller directly. In Austria, books are subject to a price-fixing restraint, which commits publishing houses and book importers to adhere to a prearranged end price. The intent of this law is to ensure a broad variety of literature and enables small bookstores to produce sufficient income to stay in operation. Legislators fear that without this system a handful of financially strong companies would push small booksellers into ruin and dominate the marketplace so that only books expected to achieve high volume sales would be available. However, the Austrian price-fixing law does not apply to English language books. American publishing houses can calculate their prices independently and negotiate directly with the bookseller over
discount rates and gross profit margins. In Austria, the average profit margin for booksellers is between 30% and 40%. (Source: Association of the Austrian Book Trade).

**Current Market Trends**

In publishing, the trend towards the digitalization of content is ongoing. More and more books are being posted on the Internet, but the costs are still very high since the process of digitalization involves expensive manual or mechanical handling. 42.3% of Austria’s publishing companies planned to publish e-books in 2012 or at a later point. Austrian publishing companies focus on the electronic book market in order to attract new customers and increase revenues. Smartphones, e-readers and tablet PCs will continuously increase the demand for electronic publications, while at the same time lowering the price for consumers due to a decrease in production costs. (Source: Association of the Austrian Book Trade)

Book sales are still dominated by Austria’s 1,918 individual bookstores. In 2005 31% of book sales were made through a chain compared to 38% in 2009 and 31.4% in 2012. Approximately 17.5% of book sales were made via the Internet. This is an increase of 18% compared to the previous year. Although individual bookstores still dominate the market, the internet will become increasingly important in capturing larger market shares from individual bookstores. (Source: Association of the Austrian Book Trade).

Because of its proximity and shared language, Germany is Austria’s premier trading partner in books, with approximately 80% of new book releases in Austria imported from Germany and approximately 80% of Austrian book exports going to Germany.
Best-Selling Publications—Top Three per Category

**Poetry and Fiction, Hardcover**
1. *Der alte König in seinem Exil* by Arno Geiger, published by Hanser
2. *Schoßgebete* by Charlotte Roche, published by Piper
3. *6 Österreicher unter den ersten 5* by Dirk Stermann, published by Ullstein

**Poetry and Fiction, Paperback**
1. *Die Diensttagsfrauen* by Monika Peetz, published by Kiepenhauer & Witsch
2. *Der Brenner und der liebe Gott* by Wolf Haas, published by dtv

**Guides, Hardcover**
1. *Schlank mit der Faustformel* by Sasha Walleczek, published by Gräfer und Unzer
2. *Das Wunder der Selbstliebe* by Bärbel Mohr and Manfred Mohr, published by Gräfe und Unzer
3. *Fuck it* by John C. Parkin, published by Ariston

**Children’s Books, Hardcover and Paperback**

**Specialized Books**
1. *Shaloin* by Bernhard Moestl, published by Droemer Knaur
2. *Himmel und Hölle* by Hera Lind, published by Diana
3. *Empört euch!* by Stephane Hessel, published by Ullstein TB
Trade Events

Frankfurter Buchmesse
Frankfurt, Germany • buchmesse.de/en/fbf

Leipziger Buchmesse
Leipzig, Germany • bit.ly/XoqacF

BUCH WIEN
Vienna, Austria • buchwien.at

Resources
• Association of the Austrian Book Trade, buecher.at
• Association of the Book and Media Industry, buchwirtschaft.at
Brazil

Summary
The Brazilian book market is valued at USD 3.3 billion, and boasts 88.2 million readers. Brazil, which is the largest emerging market after China, is seen as a lucrative opportunity for international publishers due to the nation’s rising income and improving education system, which fuels demand for books. At the same time, booksellers in Brazil are concerned with an apparent decline of readers, with the number of readers falling 7.7% between 2007 and 2011. Amazon formally entered the Brazilian market in December 2012, making its massive library of digital e-book content available in Brazil. Amazon’s entry will provide key opportunities for small and independent publishers looking to reach Brazilian consumers and take advantage of Brazil’s rapidly growing market.

Market Entry
Copyright law in Brazil is defined mostly by legislation put into place in 1998 under Ley 9610 de 1998. Currently, there is proposed legislation to modify the existing copyright protection laws. Despite significant state involvement with the publishing industry, Brazil does not have any laws setting fixed book pricing.

In Brazil, the state maintains control of education publishing, and the government chooses which books to include in government school libraries or in several Brazilian states. Books approved by the PNBE (School Library National Program) are featured in all

Statistics
Capital: Brasília
Population: 194 million
GDP: USD 2.53 trillion
Currency: Real
Language: Portuguese (Brazil)

Contact
Ligia Pimentel
Commercial Assistant
ligia.pimentel@trade.gov
55-61-3312-7450
government-controlled libraries and can dramatically impact the success of selected books.

**Current Market Trends**

Bookstores continue to be the most important distribution channel for the Brazilian book market, accounting for a share of 42.4%, including bookstores’ online sales. They are followed by wholesalers, which have experienced a slight decrease in share (2008: 25.3%; 2009: 23.8%). Door-to-door sales continue to increase and occupied third place in 2009 (2006: 5.4%; 2007: 9.5%; 2008: 13.7%; 2009: 16.6%). This is possibly a result of increased purchasing power of social classes with low income and education levels.

Brazil’s largest bookstore chains are Saraiva, Submariano, and Livaria Cultura.

To date, the e-book market in Brazil is relatively decentralized and there is no clear path for publishers to reach e-book consumers. In the market’s current state, U.S. publishers, who might otherwise commission independent translation services to translate books for foreign markets, may find it difficult to reach a substantial level of e-book sales through current channels. Publishers who wish to benefit from Brazil’s rapidly growing market could sell the rights to their books to local Brazilian publishers who can both translate the content and maintain electronic and print distribution. Despite these setbacks, the e-book market in Brazil is developing rapidly and is expected to continue over the next few years as key players enter the market.

Currently, Amazon’s e-book store primarily includes American content and has a very limited selection of original and translated Portuguese e-books. However, Amazon’s e-book market can be expected to grow quickly. Amazon’s deal with the DLD consortium will give the Amazon store a much larger collection of original Portuguese content. In addition, Xeriph, Brazil’s primary e-book aggregator, also signed a major deal to distribute additional publishing content in Brazil.

Kobo and Livaria Cultura are working jointly to develop a stronger e-book sector. In addition to their agreement to develop an e-reader device, the two companies have also signed an exclusivity agreement that will make over 3
million e-books available on electronic readers. This deal indicates the larger trend of the importance e-books in Brazil.

**Key Industry Players**

Editoria Saraiva is the publishing unit of Brazil’s largest bookstore chain Saraiva. Saraiva first entered the publishing market in 1917 and is among the most important publishers in the Brazilian market. Saraiva is particularly strong in K–12 educational books, and benefits massive government-funded purchases. In addition it also publishes trade fiction, non-fiction, children’s, business and other educational fields.

Autêntica Editoria publishes books that support educators, researchers and other professionals involved with the education sector. Like many Brazilian publishers it often works to forge deals with the Brazilian government or Brazilian agencies to offer books in state libraries and government school libraries.

The Gutenberg publishing label was established in 2003 by Grupo Editorial Autêntica to reach new audiences. Editoria Gutenberg looks to purchase translation rights for books from foreign publishers in addition to local authors. They publish about 40 fiction & non-fiction books per year.

**Current Demand**

As of 2011, Brazil had around 2,676 bookstores across the country, with 68% located in São Paulo and Rio de Janeiro regions near the “reading population”. São Paulo, Brazil’s largest metropolitan area features close to 1,500 commercial publishers who cater to Brazil’s reading population. Despite the large number of publishers, much of the Brazilian book market is still dominated by the government, especially in the north and other less wealthy sections of the country. In these areas demand is handled by the state, which primarily supplies the region with textbooks. Despite the decline of readership between 2007–11, in 2009 2.7% more titles were published and 13.5% more copies of books were printed than in 2008. In 2009 alone, 52,000 new books were published in Brazil with 386 million copies printed—nearly twice the population.
As a dominant market player, government purchases of books have a noticeable effect on demand. The recent increase in textbook sales can be attributed to government purchases of educational materials and teaching aids.

**Barriers**

Brazil’s strict legal environment and tough government control can be a deterrent to those looking to enter the market. Furthermore, DLD (Distribuidora de Livros Digitais), a consortium of seven large Brazilian publishers that controls 35% of the bestsellers in the country, has a great deal of market power. DLD members always negotiate as a block, aggressively demand favorable commercial conditions and want to maintain control over prices. DLD, however, offers an opportunity for authors looking to enter the Brazilian e-book market. In 2010, the consortium launched a joint e-book distribution platform to benefit its member companies, which include Objetiva (partially owned by Santillana), Record, Sextante, Rocco, Planeta and L&PM. Before entering Brazil, Amazon had to negotiate a contract with DLD.

In addition to legal and market barriers, the Brazilian publishing market also lacks an established e-reader market. While plans to develop this market in Brazil are in the works, such plans are years away from reaching substantial market relevance. Kobo and Livaria Cultura (a major bookstore chain) have entered a partnership and have made e-readers available since December 2012. Finally, the most substantial offering to date is by Amazon itself. While Amazon formally entered the Brazilian market in December 2012, the company began selling its Kindle e-reader in 2013.

**Resources**

- Saraiva Editoria: [editorasaraiva.com.br](http://editorasaraiva.com.br)
- Editoria Autentica: [autenticaeditora.com.br](http://autenticaeditora.com.br)
- Gutenberg: [editoragutenberg.com.br](http://editoragutenberg.com.br)
China

Summary
With its economic growth, rising incomes, and improved education, China presents foreign publishers with opportunities. In the last ten years, the number of imported book rights more than doubled, while the availability of journals and magazines distributed in the market increased tremendously. China’s General Administration of Press and Publication (GAPP) reports total sales of books in China reached USD 227.64 billion. E-book publishing in China is attracting domestic and foreign publishers alike for its lower cost and higher margins than print.

Despite the tremendous market size and profits, China has strict regulations regarding importing books and censorship. Foreign firms are not allowed to import or distribute imported books on their own in China. The right to import distribute and publish books is reserved for a collection of Chinese state-owned companies. In addition, foreign publishers must pay attention to piracy due to limited intellectual property law.

China has a huge publishing industry, with over 367,000 titles published in 2011—making it a large and lucrative market for foreign publishers. Total revenue for the publishing and printing industry in 2011 achieved USD 227.64 billion (¥1456.9 billion), with a growth of 17.7%. E-publishing, which includes e-books, online newspapers, magazines, journals, online games, audio and video publications, reached USD 21.53 billion (¥137.79 billion), with a

Statistics
Capital: Beijing
Population: 1.3 billion
GDP: USD 9.872 trillion
Currency: Yuan (¥)
Language: Mandarin

Contact
Jing Qiu
Commercial Specialist
jing.qiu@trade.gov
86-10-8531-4157
growth of 31.0%, accounting for 9.5% of the industry revenue. Driven by the new reading devices and integrated online stores and an aggressive price policy of online retailers such as Dangdang, Amazon, Douban, e-book revenue continues to expand. The market is further stimulated by iPad, Kindle, Douban reader, Hanvon reader, and various tablets and mobile devices.

Market Entry
While U.S. has the top export copyrights in China, U.S. publishing houses still face unique challenges, especially with an e-book market very different from the one in the West. China does not grant foreign companies trading rights for the importation of books, newspapers, periodicals, electronic publications and audio and video products. With the time spent dealing with import barriers, legitimate foreign vendors may fail to meet consumer demands, either in terms of content choices or reasonable prices. Potential customers may turn to file-sharing websites or illegal resources for pirated books.

Piracy and illegal use of publishing materials is rampant in China. Sharing websites offer e-books and scanned version of books available for free download. Legal protection on copyrights and enforcement is minimal.

In addition to tablets and notebooks, smart phones have become a key mobile reading device, particularly in recent years. Mobile novels are popular among young Chinese, who read them on their daily commute to work or school, as well as during leisure time. As of March 2012, China has over one billion cell phone users and 300 million smart phone users. China Mobile, one of two major telecom providers in China, is the country’s largest e-book platform. Publishers may be reluctant to sell foreign rights to China Mobile, as it takes a large cut of sales—at least 50 percent and sometimes as much as 70 percent—and sells e-books at a 90 percent discount from the print price.

Amazon acquired local online bookseller Joyo.com in 2004 and changed its name from Joyo Amazon to Amazon China. They started selling e-books through their China site in December 2012, a week after Amazon began selling them Brazil. Users can download Kindle software for free from the China website onto their iPhone, iPad, or Android device, allowing them to
read Kindle e-books on those devices. Now Amazon cooperates with large publishing house such as Random House Inc., Penguin Books, Simon & Schuster, MacMillan and Wiley in selling imported English books online. All books sold are imported through nationally acknowledged (state-owned) publishing houses.

**Current Market Trends**

With the popularity of mobile devices and the Internet, E-publishing continues to grow at the pace of 23.55%. In 2011 E-publishing reached revenues of USD 21.53 billion, growing 31% from the 2010 data.

<table>
<thead>
<tr>
<th>Year</th>
<th>Type</th>
<th>% Production Growth</th>
<th>Revenue</th>
<th>Profit</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>Paper</td>
<td>8.56</td>
<td>19.32</td>
<td>2.5</td>
</tr>
<tr>
<td></td>
<td>E-Publishing</td>
<td>3.82</td>
<td>12.89</td>
<td>1.04</td>
</tr>
<tr>
<td>2010</td>
<td>Paper</td>
<td>9.43</td>
<td>22.15</td>
<td>3.07</td>
</tr>
<tr>
<td></td>
<td>E-Publishing</td>
<td>4.69</td>
<td>16.86</td>
<td>1.45</td>
</tr>
</tbody>
</table>

Source: GAPP

**Current Demand**

Opportunities for foreign publishers wishing to sell translated titles in China primarily exist in Beijing and Shanghai. 70 percent of the 580 state-owned publishers in China are based in Beijing and Shanghai. Rights acquired from foreign countries have increased greatly: Chinese publishers acquired rights to 15,592 foreign titles in 2011, up from just 1,664 in 1995. The increase is accredited to the market opening slightly, as the General Administration of Press and Publishing (GAPP) no longer controls the publishing of translated titles directly. Today most Chinese publishers have translated titles on their lists. In addition, demand for STEM (Science, Technology, Engineering, Medicine), economic and finance books and journals are on the rise. Academic books in English language are expected to remain strong.
Key Suppliers

For companies wanting to export physical books to China, the GAPP licensed 42 state-owned companies to operate as foreign publication import agencies, six of which are licensed to import magazines. The largest distributors of overseas publications are:

- **China National Publications Import and Export Corporation (CNPIEC)**
  - Established in 1949.
  - Purchases publications for science and research libraries, provincial foreign language bookstores, and national libraries.
  - A leading enterprise with a great variety of publications.
- **China Education Publications Import and Export Corporation (CEPIEC)**
  - Established in 1987.
  - Focused on the import of academic publications and university-demanded publications
- **Beijing Zhongke Import and Export Company (BZIEC)**
  - Established in 1987.
  - Imports science and technology publications
- **China International Book Trading Corporation (CIBTC)**
  - Established in 1949.
  - Imports arts publications
- **China National Economic Publications Import & Export Corporation (CNEPIEC)**
  - Established in 1988.
  - Imports economic publications
- **China National Publishing Industry Trading Corporation (CNPITC)**
  - Established in 1980.
  - Imports overseas Chinese publications, has limited foreign publications
- **China National Sci-Tech Information Import and Export Corporation (CNSTIIEC)**
  - Established in 1987.
  - Imports science and technology publications
- **Beijing Publications Import & Export Corporation (BPIEC)**
  - 1985
  - Imports publications except journals.

Distributor competition is mainly among these eight state-owned firms.
Barriers
Foreign publishers must work with one of China’s state-owned publishing houses to obtain book codes (ISBNs) assigned by the GAPP. They may also partner with a private Chinese company, who works through a state-owned publishing house to obtain an ISBN code and publish the book. In addition, publishing law forbids foreign firms from having editorial control. Therefore, authors and publishers must be prepared for modifications on the book content to pass censorship or cater to publishing requirements.

Piracy poses a constant threat to the foreign and domestic publishers alike. There is little law and regulation concerning printing piracy, and virtually no control on the distribution of E-publishing. Pirated copies of best sellers, educational/reference material etc. are sold in hardcopies throughout the country. With more people using the Internet in China, pirated copies are made into e-books and people can download them for free. Online-sharing and cloud services not only provides readers with free resources to e-books, but also makes piracy a rampant issue in E-publishing.

Trade Events

Beijing International Book Fair
bibf.net

Hong Kong Book Fair
hkbookfair.hktdc.com/en

Shanghai Book Fair
Resources

- General Administration of Press and Publication of the People's Republic of China (GAPP): www.gapp.gov.cn
- China Pub: AirReader E-Book Division: china-pub.com/ebook
- People’s Literature Publishing House: bit.ly/X0teho
- China Intercontinental Press: www.cicc.org.cn
- Shanghai Foreign Language Education Press: sflep.com/english
Egypt

Summary
In 2012, the publishing market in Egypt was estimated at USD 160 million. About 35% (USD 56 million) of this market is generated through imports, based on educational requirements accounting for 80% of all book imports. There are 500 publishers and about the same number of bookstores.

The Egyptian government is focusing on developing and enhancing the country’s education level. As a result, the growth rate of imported books in the fields of technical, scientific and professional, non-fiction books, novels, and self-help biography is expected to increase. The demand for foreign magazines, newspapers, and periodicals is growing, particularly among the expatriate community and affluent Egyptians, who comprise approximately 3% of the total population.

Of the 82 million Egyptians living in the country, there are 27 million students. Most of Egypt’s 22 government universities and 30 private universities use English language to teach their curriculum. Around 3,000 schools in Egypt are offering International Education programs such as the American, British and German systems. Of these, 150 offer American Education Programs. According to statistics, the number of university graduates is estimated at 1.3 million as of 2012.

Statistics
Capital: Cairo
Population: 82 million
GDP: USD 443 billion
Currency: Egyptian Pound
Language: Arabic

Contact
Tarek Khodary
Commercial Specialist
tarek.khodary@trade.gov
+202 2797-2038
About 18 million are enrolled in government schools and 2.5 million in private schools. The number of schools increased from 11,000 in 1990 to more than 50,000 in 2012. Modern educational facilities including computers, e-books, multimedia laboratories, Internet and satellite educational channels are being introduced to schools. To date, 1.1 million teachers have been trained and tested via a distance-learning program using video conferencing. It is worth mentioning that trained personnel’s salaries have increased by 250%. In its entirety, the total education expenditure in the financial year 2012/2013 was estimated at about 19% of the total budget compared to about 22% in 2011/2012, marking a 25% increase between the two financial years.

Given the economic and political circumstances in Egypt after the revolution, there does not seem to be clear educational policies. The Government of Egypt (GOE) is financing educational reform through local sources, bilateral donors including the U.S. Agency for International Development (USAID), DANIDA (Denmark), CIDA (Canada), Jaica (Japan), and multilateral donors including the UNDP, African Development Bank, African Development Fund, the Kuwaiti Development Fund, IBRD, and World Bank.

USAID support for Egypt’s education and training needs has been ongoing since 1975. Total USAID assistance from 1975 through 2008 amounted to USD 1 billion. USAID’s current focus is on meeting the needs of out-of-school children, in the most disadvantaged areas of Egypt through community schools. USAID is also involved in a small schools construction program and literacy classes, all of which are strongly encouraged by the GOE. USAID supports a research program that promotes university-to-university collaboration on key development issues..

**Market Entry**

U.S. publishers have captured a 45% market share of Egypt’s import books and periodicals market, while U.K. firms hold 35%, Other key import countries include France (8%), India (10%) and Germany (2%). Imported books are subject to a 5% duty.
Successful market entry depends mainly on price, book design and quality of paper. A successful importer and distributor should have outlets in major upscale malls and districts. Discounts ranging between 10%-20% granted to walk-in clients are of paramount importance to boost sales. Moreover, participation in major local book fairs is crucial to build awareness.

**Current Market Trends**

In Egypt, English has become the first language in business and science communities. The educational sector comprising private universities and schools enjoys continued growth. A leading importer and distributor of books, which predominantly sources from the United States, indicated that 80% of sales are to the educational sector, mainly through tenders, while the balance is to walk-in clients and bookstores.

The goal of the government’s National Book Program (NBP) is to foster a generation eager to read not only for knowledge, but also for pleasure. This program provides Egyptian children in all public schools with libraries that include high quality books to help them achieve literacy and develop their love for reading. Under the NBP, USAID will finance the provision of books and supplementary educational materials to more than 50,000 government schools in Egypt. This program is conducted in collaboration with the Ministry of Education and the Integrated Care Society, who appoint the members of the Steering Committee which selects all NBP books.

The appearance, attractiveness, quality of illustrations, and durability of books are critical aspects in determining children’s reading readiness and growth. The books acquired under the National Book Program meet the highest international quality standards for the production and illustration of children’s books. This is placing Egyptian publishers in a competitive position throughout the Middle East and Arab world.

The close working relationship between the Ministry of Education and the Integrated Care Society further benefits the Egyptian education system by training librarians and teachers to effectively use new books and early reading materials. The program will include a social marketing component to promote positive messages, particularly among parents, related to literacy and reading.
Challenges
Government censorship is an issue that may cause delays in clearing books, as well as confiscation. Well-established importers of books have found it advantageous to clear the titles of books with the censorship department prior to placing an order. If a title is not cleared it will be dropped from the list. Leading importers indicate that book piracy is an issue for educational books sold to universities, but is limited for books sold to private schools and extremely minimal for non-educational books.

Trade Events
Cairo Book Fair
egyptianbook.org.eg/en
France

Summary
The French market covers 5,000 publishing houses, among which 1,000 are commercially active. Large companies with revenue exceeding one million euros are involved in all editorial categories and take advantage of strong distribution networks. Small publishers with revenue of less than 1 million euros are highly specialized and are more and more marginalized by distributors.

<table>
<thead>
<tr>
<th>French Publishing Industry Statistics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revenue (USD billions)</td>
</tr>
<tr>
<td>------------------------</td>
</tr>
<tr>
<td>50+</td>
</tr>
<tr>
<td>10–50</td>
</tr>
<tr>
<td>5–10</td>
</tr>
<tr>
<td>1–5</td>
</tr>
<tr>
<td>&lt;1</td>
</tr>
<tr>
<td>Total</td>
</tr>
</tbody>
</table>


Statistics
Capital: Paris
Population: 65.3 million
GDP: USD 2.58 billion
Currency: Euro (€)
Language: French

Contact
Valérie Ferrière
Trade Specialist
valerie.ferriere@trade.gov
+33 (0) 1 43 12 70 77
## Book Sales

<table>
<thead>
<tr>
<th>Type of Book</th>
<th>2010 Revenue (EUR millions)</th>
<th># sold, 2010</th>
<th># New Titles</th>
<th>Average Print Run</th>
</tr>
</thead>
<tbody>
<tr>
<td>Literature</td>
<td>654,723</td>
<td>114,103</td>
<td>7,613</td>
<td>10,547</td>
</tr>
<tr>
<td>Practical</td>
<td>482,857</td>
<td>66,147</td>
<td>7,026</td>
<td>6,998</td>
</tr>
<tr>
<td>Youth</td>
<td>368,290</td>
<td>90,325</td>
<td>5,651</td>
<td>9,759</td>
</tr>
<tr>
<td>Education</td>
<td>367,649</td>
<td>61,704</td>
<td>3,004</td>
<td>9,393</td>
</tr>
<tr>
<td>Comics</td>
<td>231,520</td>
<td>42,335</td>
<td>2,832</td>
<td>12,057</td>
</tr>
<tr>
<td>Human &amp; Social Sciences</td>
<td>218,371</td>
<td>18,455</td>
<td>6,645</td>
<td>3,404</td>
</tr>
<tr>
<td>Dictionaries</td>
<td>113,253</td>
<td>81,886</td>
<td>516</td>
<td>17,996</td>
</tr>
<tr>
<td>News</td>
<td>97,499</td>
<td>12,100</td>
<td>2,522</td>
<td>4,277</td>
</tr>
<tr>
<td>Sciences</td>
<td>95,537</td>
<td>6,036</td>
<td>1,933</td>
<td>2,638</td>
</tr>
<tr>
<td>Maps</td>
<td>44,977</td>
<td>13,618</td>
<td>1,329</td>
<td>7,177</td>
</tr>
<tr>
<td>Religion</td>
<td>32,477</td>
<td>5,225</td>
<td>950</td>
<td>3,593</td>
</tr>
<tr>
<td>Documentation</td>
<td>182</td>
<td>388</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Total</td>
<td>79</td>
<td>512,322</td>
<td>40,021</td>
<td>7,985</td>
</tr>
</tbody>
</table>


## Current Market Trends

Most French still buy books in bookstores, but several market studies in e-commerce found that books are one of the fastest growing sectors in terms of online sales.

### Book Purchases, 2010

<table>
<thead>
<tr>
<th>Type of Retailer</th>
<th>% Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bookstores, 1st and 2nd level</td>
<td>45%</td>
</tr>
<tr>
<td>Specialized retail distribution network (e.g. FNAC, Virgin)</td>
<td>28%</td>
</tr>
<tr>
<td>Non-specialized retail distribution network (e.g. supermarkets)</td>
<td>19%</td>
</tr>
<tr>
<td>Online sellers</td>
<td>8%</td>
</tr>
</tbody>
</table>

Best Opportunities for U.S. Publishers

- Arts, Design, & Life Style
- Cooking & Gastronomy
- Travel & Tourism
- Children’s books (about 20% of the market)
- Comic Books
- Spirituality & Body Care
- Human Sciences

Leading French Book Publishing Companies

Source: Xerfi, August 2011

- Hachette Livre (Lagardère 100%)
- France Loisirs (via Bertelsmann—Germany)
- Flammarion (via RCS Media Group—Italy)
- Editions Atlas (via Agostini—Italy)
- Gallimard Edition (France)
- Editions Francis Lefebvre (France)
- Elsevier Masson (via Reed Elsevier—UK)
- Editions Albin Michel (France)
- Les Editions Hatier (via Lagardère)
- Actes Sud
- Editions Larousse (via Lagardère)
- Glénat Editions (France)

Barriers

France is one of several countries in Europe that engages in price fixing on books. The law that permits this in France is called the Loi Lang, instituted in 1981. Anyone who publishes or imports a book in France is required to fix one price for the book’s sale to the entire public. Discounts cannot be more than 5% of the price set by the publisher. The growing success of Internet sales may be detrimental to this policy, as books can be bought more cheaply from British or other booksellers online. Several European Union governing bodies have started to examine price fixing policies on books, as some find it to be a barrier to free trade in the European market. In France,
books are subject to the value added tax (VAT) of 7%. The standard VAT rate is 19.6%.

**Audiobooks**

Since June 2009, audiobooks have benefited from the reduced VAT rate in the European Union, 5.5% in France in 2011. However, downloading books from digital files, which is an electronically service, remains subject to the standard VAT rate of 19.5%.

Widespread in the United States, Great Britain, Italy, Germany, Poland or Northern Europe (more than 10% of the book market), the market for audiobooks is beginning to develop in Francophone countries. It is currently 0.7% of the book market in France.

**Major Audiobook Publishers include:**

- Gallimard
- Audiolib (Hachette Livre + Albin Michel + Bertelsmann)
- Flammarion.
- Frémeaux & Associates (record market)
- VDB (experts in production for the blind)
- Lire dans le Noir (experts in production for the blind)
- Editions Women
- Le Livre qui Parle
- Livraphone
- Thelezma
- SonoBooK
- Sixtrid.

Since 1986, the bookstore *Mots et Merveilles* in Paris has sold only audiobooks.

**Retail Distribution Networks**

- FNAC
- France Loisirs
- Virgin Megastore
- Amazon
- E-leclerc
- Le Grand Livre du Mois
- Gilbert Jeune
Trade Events

Salon du Livre (Paris Book Fair)
Paris, France • salondulivreparis.com/xb
France’s major publishing fair. 1,100 exhibitors. The fair hosts 200,000 consumers and 30,000 trade visitors. An international section includes 40 countries.

Resources—Organizations

Le Syndicat National du Livre
(French Books & Publishing Association)
+33 (1) 44 41 40 50 • sne.fr
France’s trade association of book publishers. Approximately 400 members.

Le Centre National du Livre (The National Books Center)
+33 (1) 49 54 68 68 • francelivre.org/en
Founded in 1930. Provides financial support to smaller publishing houses through non-interest loans. Also organizes cultural meetings such as the annual Belles Etrangères, which brings together international authors so they can share their work.

Le Bureau International de l’Edition Française
(International Bureau of French Publishing)
+33 (1) 44 41 13 13 • bief.org
Founded in 1873, Le Bureau International de l’Edition Française (BIEF) is a professional organization that includes all publishing houses who have international activity. It helps French authors export their books, and receives significant support from the French Ministry of Culture and the Foreign Ministry. BIEF participates in all the major international book fairs and coordinates introductions between French and foreign publishers.

French Ministry of Culture
+33 (1) 40 15 80 00 • culturecommunication.gouv.fr
Resources—Industry Publications

BoOks
+33 (1) 44 41 40 50 • booksmag.fr

Livres Hebdo
+33 (1) 44 41 28 00 • livreshebdo.fr

LIRE
+33 (1) 75 55 10 00 • lire.fr
Germany

Summary
The German-language book market is one of the largest in the world. In fact, more books are published in the German language each year than in any language apart from English and Chinese. With 96,273 new and reprinted titles published in 2011 and translations into 47 foreign languages, Germany is among the world’s leading book producers. According to the German Publishers and Booksellers Association (Boersenverein des Deutschen Buchhandels, www.boersenverein.de), the book trade in Germany generated total sales of EUR 9.6 billion in 2011. Germany also dominates book sales in Switzerland and Austria, which import more than 80% of publications sold in these markets.

The German book market suffered a decline in 2011. Unlike in 2010, when sales rose by 0.4% to EUR 9.74 billion, sales declined by 1.4% to EUR 9.6 billion in 2011. The German Publishers and Booksellers Association sees the sales decrease as a delayed result of the overall economic downturn in Europe. In comparison to a 0.4% sales rise in 2010, the three main sales channels covering retail bookselling, publishing trade, and mail order book trade posted a loss of 1.8% in 2011. Department stores and book clubs were hit hardest and had to face sales decreasing by 13.1% and 12.7%, respectively. The huge decreases could only partly be compensated for by the sales increase in the mail order book trade, the bulk of which consisted of rising online book sales (5% increase

Statistics
Capital: Berlin  
Population: 82.01 million  
GDP: USD 2.806 trillion  
Currency: Euro (€)  
Language: German

Contact
Volker Wirsdorf  
Senior Commercial Specialist  
volker.wirsdorf@trade.gov  
+49-211-753531-50
compared with 2010, according to German Publishers and Booksellers Association).

Three market segments account for more than half of total sales: fiction, non-fiction and textbooks. These segments developed quite differently in the course of 2011. Between January and December 2011 fiction accounted for 37.8% of total sales and was the best performing segment. Bilingual books saw a 16.4% decrease and science fiction/fantasy experienced an 8.8% drop. The best performing subsegments were mixed anthologies and thrillers, gaining 6.2% and 2.6%, respectively.

Accounting for 13.6% of total sales, scientific books declined by 3.3%. The subsegments sports (-16.3%) and law, job, finances (-13.3%) were the weakest in the period from January till September 2011. The non-fiction books segment overall did not perform very well. While it accounted for 9.7% of total sales, it lost 7.4% in comparison to the previous period. The arts and literature subsegment performed poorly between January and April 2011, too, with a decrease of 10.2%.

<table>
<thead>
<tr>
<th>Book Sales—Fiction, 2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subsegment</td>
</tr>
<tr>
<td>Narrative Literature</td>
</tr>
<tr>
<td>Thriller</td>
</tr>
<tr>
<td>Science Fiction, Fantasy</td>
</tr>
<tr>
<td>Humor, Comic</td>
</tr>
<tr>
<td>Gift Books</td>
</tr>
<tr>
<td>Lyric, Drama</td>
</tr>
<tr>
<td>Bilingual Books</td>
</tr>
<tr>
<td>Mixed Anthologies</td>
</tr>
<tr>
<td>Total</td>
</tr>
</tbody>
</table>

German Publishers and Booksellers Association 2011
### Book Sales—Non-fiction, 2011

<table>
<thead>
<tr>
<th>Subsegment</th>
<th>% Share</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Politics, Economics</td>
<td>34.5</td>
<td>+20.2</td>
</tr>
<tr>
<td>Encyclopedia</td>
<td>15.2</td>
<td>-0.8</td>
</tr>
<tr>
<td>History</td>
<td>13.5</td>
<td>-0.9</td>
</tr>
<tr>
<td>Psychology, Esoteric</td>
<td>10.6</td>
<td>+3.5</td>
</tr>
<tr>
<td>Philosophy, Religion</td>
<td>8.5</td>
<td>+11.2</td>
</tr>
<tr>
<td>Arts, Literature</td>
<td>6.2</td>
<td>-10.2</td>
</tr>
<tr>
<td>Music, Film, Theatre</td>
<td>6.7</td>
<td>+12.8</td>
</tr>
<tr>
<td>Nature, Technology</td>
<td>4.8</td>
<td>+1.1</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>9.7</td>
<td>-7.4</td>
</tr>
</tbody>
</table>

German Publishers and Booksellers Association 2011

### Book Sales—Textbooks, 2011

<table>
<thead>
<tr>
<th>Subsegment</th>
<th>% Share</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Foods</td>
<td>21.5</td>
<td>+0.9</td>
</tr>
<tr>
<td>Everyday Life</td>
<td>19.5</td>
<td>-3.9</td>
</tr>
<tr>
<td>Health</td>
<td>18.3</td>
<td>-4.5</td>
</tr>
<tr>
<td>Nature</td>
<td>11.9</td>
<td>-2.0</td>
</tr>
<tr>
<td>Hobby, Home</td>
<td>10.9</td>
<td>+4.3</td>
</tr>
<tr>
<td>Spirituality</td>
<td>6.5</td>
<td>-12.9</td>
</tr>
<tr>
<td>Sports</td>
<td>4.0</td>
<td>-16.3</td>
</tr>
<tr>
<td>Law, Job, Finances</td>
<td>4.1</td>
<td>-13.3</td>
</tr>
<tr>
<td>Ships, Cars, Space Travel</td>
<td>3.3</td>
<td>-7.9</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>13.6</td>
<td>-3.3</td>
</tr>
</tbody>
</table>

German Publishers and Booksellers Association 2011

Despite the drop in foreign language sales, there is still considerable demand in Germany for books in the English language. According to the German National Bibliography, translations accounted for 10,716 of newly published titles in 2011. English came first with 63.8%, followed by French
(10.4%), and Japanese (6.0%). The study shows that 76% of the books on German bestseller lists are written by foreign, mainly American and English authors, which is surprisingly high compared to a share between 20% and 40% in other European countries. With regard to license agreements, China represents Germany’s most important foreign trade partner, with more than 1,072 acquired licenses.

**Market Entry**

Independent bookshops dominate the retail sector in Germany. In 2011, sales by traditional bookshops accounted for 50.6% of total market sales, a 2.3% decline compared with 2009. However, there is a continuing trend toward larger retail formats. Direct sales by publishers to end-users represent 19.1% of total sales. In 2011, the Internet accounted for 17.8% of all book sales (up from 15.5% in 2009), leading the German book market in terms of growth. This steady increase in e-commerce partly stems from the continuing expansion of e-book offers. As previously stated, some 42% of all new titles are also published as e-books. According to its own press release, Amazon, the leader in this channel with an estimated share of more than 50% of all Internet sales, sold more e-books than hardcover books in 2011. Less significant and declining are department store sales, making up just 1.86% of the total. (*Branchen-Monitor BUCH Gesamtjahr 2011 Report*)

In practice for over 120 years, the fixed book price agreement became law in 2002. The “Buchpreisbindungsgesetz” stipulates that publishers or book importers set a fixed price for all books, sheet music, cartographic products and products which reproduce one of the aforementioned products. The law applies to books in foreign languages published in Germany as long as they are sold mainly in Germany. The fixed price is valid for at least 18 months. This non-price competition aims to preserve a great number of bookstores, promote them as cultural foundations and make books accessible for the broad public. Only used, damaged or imported books are exempt from this law. Important to note is the 7% VAT rate applicable for books; VAT for most other products is presently 19%.
Current Market Trends
E-books represent a growing sector of the German book market. More than half of all publishing companies are selling e-books and the number is expected to increase to 90% in the near future. In 2011, some 42% of all new and reprinted titles also appeared in e-book form and about 4.7 million e-books were sold in total. Despite the growth, they account for only 1% of total sales to end-users. But compared with 2010 figures, total sales of e-books have risen by about 77%. The German Publishers and Booksellers Association believes that investments in the e-book segment will significantly increase. The management consultancy Kirchner + Robrecht stated that the number of total sales in e-books will exceed 60 million by the year 2015.

Main Competitors
Sales of U.S. books in Germany lag behind sales of UK books by a relatively wide margin, partially as a result of the creation of the EU’s single market in 1993 and the trade advantages that came with it for the UK. Another factor may be the gradual reduction in American military presence in Germany that continues today. Yet another factor is the consistent use of British materials in German classrooms at the elementary and intermediate level; only at the advanced levels are teachers and students free to choose their reading material. However, German imports of books printed in the UK in the last two years have fallen sharply. The value of products printed in the United States imported by Germany was over 20 times that of Canadian products and over 140 times that of Australian products.

Current Demand
Some 92% of German students learn English as a second language in school (Eurostat, 2009 data); currently around 8 million school children are enrolled in English language courses, as all primary schools in Germany are now required to provide foreign language courses as part of their main curriculum starting in third grade. Furthermore, English is the most widely spoken foreign language in the country. According to a study by the European Commission, over half of Germans age 15 and older are able to
converse in English. This puts Germany well ahead of the European average of 34% for this age group.

**Barriers**

Imported books and other printed materials (TARIC Code, Section 10, Chapter 49) are free of import duties. Goods imported into Germany from non-EU countries are subject to an import sales tax, which in later distribution channels is passed on to the end-users as value-added tax (VAT). Through an exception in EU tax laws, the VAT levied on books and other printed materials is 7%.

**Trade Events**

**Frankfurt Book Fair**

Frankfurt, Germany • [buchmesse.de/en/fbf](http://buchmesse.de/en/fbf)

The largest publishing trade show in the world. 290,000 visitors, 6,000 exhibitors.

**Resources**

- Fixed Book Price Agreement (Buchpreisbindungsgesetz), [bundesrecht.juris.de/buchprg](http://bundesrecht.juris.de/buchprg)
- German Publishers and Booksellers Association (Börsenverein des Deutschen Buchhandels), [boersenverein.de](http://boersenverein.de)
- German National Library, [dnb.de/EN](http://dnb.de/EN)
India

Summary
India is a story of growth and opportunity. India’s sustained growth of around 6.9% in 2011 and growing dynamism in several of its regional markets have created wide and diverse business prospects for U.S. exporters. Though 2012–13 rates are estimated at below 6% growth, India remains one of the fastest growing, most dynamic economies in the world.

A growing economy and rising GDP creates a demand for a more educated and knowledgeable workforce, driving demand for books as a source of knowledge. A growing GDP results in increased income and expenditures for various products, including books.

Statistics
Capital: New Delhi
Population: 1.2 billion
GDP: $1.848 trillion
Currency: Indian Rupee (INR)
Language: Hindi, English, others

Contact—New Delhi
Pat Cassidy
Commercial Officer
pat.cassidy@trade.gov
+91-11-23472192

Contact—New Delhi
Sandeep Maini
Commercial Specialist
sandeep.maini@trade.gov
+91-11-23472222

Contact—New Delhi
Bharati Oberoi
Commercial Assistant
bharati.oberoi@trade.gov
+91-11-23472214

Contact—Chennai
Malarvizhi Parimel
Commercial Assistant
malarvizhi.parimel@trade.gov
+91-11-28574192
Market Entry

India is the sixth largest book publishing country in the world and third largest publisher of English titles after the United States and the United Kingdom. In addition to English, the Indian publishing industry publishes in 24 regional languages to meet the local needs of the population.

Viewed as one of the fastest-growing English-language markets in the world, the Indian publishing industry has an annual turnover of over $2,500 million and is growing by over 20 percent every year. Almost 100,000 titles are published per year and more than 40% of these are English titles.

Leisure coffee table reading, reading galleries at bookstores, increased participation of International publishers at Indian book fairs and e-books are all proving to be new avenues to boost sales. Since publishing is driven by consumers, book publishing and promotional events in India have become trendier with gala book launch events, more reader–publisher interactions and preview booklets of upcoming titles. Though the number of Indian authors is increasing, the pool of established writers is still limited.

A recent survey of readers between the ages of 13–35 years of age in India found that for 83 million youth readers (comprising 25% of the youth population), fiction is the most preferred genre among 42% of the youth, followed by 24% for non-fiction. Fantasy, comics and classics are the three most preferred genres of fiction, and the least preferred are romance and graphic novels. When it comes to non-fiction, religious/spiritual texts and biographies/autobiographies are the most preferred.

In general, the Indian publishing industry is dependent on volumes. Therefore, there is a focus on reduced pricing by compromising on quality. Finding the right partner, ensuring proper licensing and establishing an effective readership base are the factors that a company looking to enter the Indian publishing industry should consider.
Current Market Trends
At present the Indian publication industry is estimated to have approximately 20,000 publishers, spread in fields of literature, science, fiction, art and others. The industry churns out more than a 100,000 titles every year in all major Indian languages including English. The number of books published in English is growing by 30% a year. Within the publishing industry in India, the focus is on academic and children’s books. Fiction in English language does well. There has been a reduction in the average expenses per publisher and more importantly the average selling price of books has fluctuated. Imported titles continue to be more expensive than Indian titles. Future growth is forecast for academic publications, children’s books, and fiction in English as well as regional languages.

The e-book market in India is in the nascent stage, but with the growth of technology and proliferation of ecommerce portals this segment has increasing potential.

Main Competitors

Current Demand
Even with around 12% of India’s population reading English, this works out to a substantial 125 million potential English readers. In comparison to the number of English speakers in USA (about 225 million), number of English speakers in Canada (about 20 million) the entire populations of Britain (about 60 million) and Australia (about 20 million), the 125 million potential English readers constitute a large readership in terms of absolute numbers. Experts indicate that India’s clout is only likely to grow further in the coming decades in the global market for English language publishing.
The per capita book title output for India is about 8 to 10 titles per 100,000 population, far lower than what it ought to be when compared to the per capita book title output in the mature publishing markets like UK, USA, France and Germany. More than 8,000 daily newspapers are published in India, including a large number of weekly and biweekly periodicals published in all Indian languages. International exposure, increasing awareness and India’s growing consumer class are factors that drive the demand in the publishing sector.

Barriers

In India the piracy of literary works takes three principal forms:

- Wholesale reprinting of trade and text books.
- Unauthorized translations.
- Commercial photocopying of books and journals.

Industry sources have attributed a loss of nearly 50 percent of the legitimate book trade to book piracy, but due to outdated statistics the exact loss due to piracy remains unknown and continues to be a problem. Leakage and reverse leakage are two other growing concerns for foreign publishers operating in India. However, the Government of India, along with the publishing industry, recognizes these threats and is making efforts to combat these challenges. The Government of India has started taking measures towards protection of Intellectual Property Rights (IPR) by constituting a Copyright Enforcement Advisory Council (CEAC) and setting up special cells for copyright enforcement across the country. The pace of enforcing copyright protection laws by the judiciary is slow but awareness is on the upswing, thanks mainly to the efforts of publishers.

The distribution network consists of wholesale and retail distributors who represent foreign and Indian publishers. Lack of a cohesive network, proper distribution outlets and good public libraries are causes for concern.

While there is demand for U.S. academic and educational titles, it is advisable to modify content, keeping in mind Indian culture and religious sensitivities.
Trade Events

New Delhi World Book Fair
newdelhiworldbookfair.gov.in

The New Delhi World Book Fair (NDWBF) is organized by the National Book Trust, India, an apex body of the Government of India, Ministry of Human Resource Development. The 2012 fair attracted about 1300 Indian exhibitors and 30 foreign exhibitors.

Resources

- National Library: nationallibrary.gov.in
- Federation of Indian Publishers: fipindia.org
- Federation of Publishers’ & Booksellers’ Associations in India: fpbai.org
- National Book Trust: nbtindia.org.in
- Association of Publishers in India (API): publishers.org.in
- Deputy Registrar of Copyrights: copyright.gov.in
- Department of Education: education.nic.in
- Directorate General of Foreign Trade (DGFT): dgft.gov.in
- Central Board of Excise & Customs: cbec.gov.in
Mexico

Summary
During recent years, the publishing industry in Mexico has shown continuous growth. According to the National Publishing Industry Association (Caniem), sales in 2011 were around US$800m. Mexico is a large and diverse country with over 112 million inhabitants, positioned as the most populous in Latin America after Brazil. It is estimated that government publishing represents about 63% of the total market (246 million books per year), while commercial publishing represents about 37% of the market. Book imports to Mexico are comprised mostly from the United States, Spain, Germany and Great Britain. U.S. proximity to Mexico provides a competitive advantage to U.S. firms over more distant foreign competitors due the lower cost of shipping.

Market Entry
In Mexico, there are three main methods of entering the publishing industry. The author can contact a publisher who has business relationships with bookstores and specialty libraries to reach consumers. Alternatively, the publisher can work through a distributor to access channels such as bookstores, self-service stores, direct-sale, newspaper and magazine street stands, among others. The third option involves the author contacting book importers directly who will approach those outlets. Please note that distribution through bookstores is subject to the particular bookstore’s internal policies for new acquisitions.

Statistics
Capital: Mexico, D.F.
Population: 112 million
GDP: USD 1.667
Currency: Mexican peso (MXN)
Language: Spanish

Contact
Martha Sanchez
Senior Commercial Specialist
martha.sanchez@trade.gov
(011-52-55) 5140-2621
% Sales Distribution Channels for Books

<table>
<thead>
<tr>
<th>Channel</th>
<th>% Share</th>
<th>Channel</th>
<th>% Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Government</td>
<td>33</td>
<td>Department Stores</td>
<td>8</td>
</tr>
<tr>
<td>Bookstores</td>
<td>29</td>
<td>Others</td>
<td>6</td>
</tr>
<tr>
<td>Exports</td>
<td>11</td>
<td>Companies</td>
<td>4</td>
</tr>
<tr>
<td>Schools</td>
<td>9</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Caniem

Current Market Trends
The most recent national census in 2010 estimated the population of Mexico to be 112 million, while Mexico City and surrounding areas have 25 million, the largest population concentration in the world. There are two other metropolitan cities, Guadalajara and Monterrey, which make up 2% of the national territory yet have 25% of the country’s total population.

To become the Latin American leader in the publishing industry, the Mexican government, specifically through the Education Ministry, has implemented several programs to improve educational levels and literacy such as the production and distribution of free official books for elementary and secondary schools. It is a key element to increase reading and improve the level of education in the country. According to a survey conducted by the National Council for Culture and Arts (Conaculta), 56.4% of Mexicans read books, 42% read newspapers, 39% read magazines and 12% read comics.

Mexico is a country with a large population of young people, and according to the latest National Survey of Reading, people between 18–22 years old report the highest level of reading habits. The largest children's library in Mexico and one of the largest in Latin America opened its doors in Mexico City in November 2012. It will display about 25,000 titles and more than 3,000 in digital format, with the aim of promoting reading among the city’s young population.

Headquarters for the Mexican book industry are heavily concentrated in the Mexico City metropolitan area (80% concentration) followed by smaller concentrations of industry-affiliated businesses in Queretaro, Sinaloa.
and other states. Online book selling is a growing trend in Mexico due to increased use of the internet as well as the time-saving benefits of online shopping. However, shipping costs and delivery times are still an obstacle especially due to high courier rates.

Digital publishing is becoming popular in Mexico, as the increasing access to the internet and the adoption of technology such as tablets and smartphones is changing the way people access to culture.

Mexico is working with the Regional Center for the Advancement of the Book in Latin America and the Caribbean (CERLALC) to lead the push towards a common digital platform for Latin America.

Data
The National Publishing Industry Association (Caniem) reported sales of $855 million dollars in 2011. The book market is dominated by educational products, representing about 60% of total sales, mainly dominated by the government through programs like “Bibliotecas de Aula, Escolares and Texto de Secundaria Gratuito”. Eighty nine percent of the commercial book production was sold in Mexico, from which 45% was distributed in Mexico City. In 2011 over 25,000 titles were published showing an increase of 6% from previous years.

<table>
<thead>
<tr>
<th>Main Sectors of Interest</th>
<th>% Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>School</td>
<td>32.5</td>
</tr>
<tr>
<td>Literature</td>
<td>23.3</td>
</tr>
<tr>
<td>History</td>
<td>22.7</td>
</tr>
<tr>
<td>Personal Growth</td>
<td>19.7</td>
</tr>
<tr>
<td>Biographies</td>
<td>16.4</td>
</tr>
<tr>
<td>Scientific &amp; Technical</td>
<td>16.1</td>
</tr>
<tr>
<td>Encyclopedias</td>
<td>15.2</td>
</tr>
<tr>
<td>Tales</td>
<td>11.8</td>
</tr>
</tbody>
</table>

Source: Conaculta

According to the latest Survey of Reading, 59% of Mexicans buy books, 20.1% borrow the books from family or friends, 17.9% have received books as gifts; and 10.2% have used a library. In 2010, Mexico exported 15.4 million books, with a sale value of USD 75.1 million; 12.9 million books were imported with a total cost of USD 55.1 million.
The adoption of new technologies has impacted the publishing industry in Mexico. In its early stages, Mexico will take the lead in Latin America in the transition of the traditional book industry to the e-book era. Some of the challenges to overcome will be:

- The digitalization of existing titles;
- The search of technology partners;
- The coordination of simultaneous print and digital launching of titles;
- Training on digital tools (e-commerce, e-marketing, etc.).

Publishers have some concerns about this transition, but realize that readers’ habits are changing.

Main Competitors
During the last few years, the publishing import market has been dominated by the United States and Spain. Other strong competitors are the U.K., Germany and China.

### Mexican Exports

<table>
<thead>
<tr>
<th>Country</th>
<th>% Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Guatemala</td>
<td>29%</td>
</tr>
<tr>
<td>United States</td>
<td>25%</td>
</tr>
<tr>
<td>Costa Rica</td>
<td>24%</td>
</tr>
<tr>
<td>Peru</td>
<td>22%</td>
</tr>
</tbody>
</table>

Source: Caniem

### U.S. Exports of HS 4901—Books, Brochures & Similar Printed Matter

<table>
<thead>
<tr>
<th>Partner</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canada</td>
<td>1,079,726,985</td>
<td>1,150,721,864</td>
<td>1,111,923,921</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>423,029,723</td>
<td>424,698,588</td>
<td>455,559,969</td>
</tr>
<tr>
<td>Mexico</td>
<td>150,447,371</td>
<td>151,314,906</td>
<td>120,354,108</td>
</tr>
</tbody>
</table>

Source: U.S. Census Bureau, Office of Trade and Industry Information; International Trade Administration, U.S. Department of Commerce; December 2012
Current Demand
There are significant publishing opportunities for US exporters:

- New printing technology
- Best-sellers
- Technical books
- Scientific books
- Dictionaries
- Books for children

Barriers
As prescribed in the Book Reading Promotion Law, any book published in Mexico must contain information such as the title, author name, editor, edition number, date and printed date, editor name and business address, ISBN and bar code number.

In order to comply with this law, the book importer or publisher is obligated to set a fixed sales price known as a unique price, with exemptions given to educational entities and scientific research institutes. The importer and/or publisher can apply lower sales prices only for books already on the shelf for 18 months, antique books, used books, sold-out books, and hand-made books. Prices are to be registered online with the National Council of Book Promotion.

Like the United States, Mexico uses the Harmonized Tariff System (H.S.). However, Mexico uses only eight digits while the U.S. uses up to ten digits. HS codes are mostly universal, but a few U.S. and Mexican codes are different. Overall, there are no major regulations for books, periodicals and related materials, though importers need to have an import license. Furthermore, the Tax Law exempts importers from paying 16% tax for books imported into the country. However, U.S. exporters are advised to work closely with their importers and customs brokers to ensure that any specific requirements for their books and materials are met, avoiding complications at the border.

Intellectual Property Rights
Two different laws provide the core legal basis for protection of intellectual property rights (IPR) in Mexico: the Industrial Property Law (Ley de Propiedad Industrial) and the Federal Copyright Law (Ley Federal del Derecho de Autor).
The National Institute of Author Rights (Instituto Nacional del Derecho de Autor) administers Mexico’s copyright register and also provides legal advice and mediation services to copyright owners who believe their rights have been infringed.

It is highly recommended that US exporters register their copyrights in Mexico to get protection. For more information, please visit [www.stopfakes.gov](http://www.stopfakes.gov).

U.S. authors need to be aware of Intellectual Property Rights protection in the U.S. and abroad including Mexico. The U.S. Department of Commerce provides information to obtain IPR protection in the United States. For more information, please visit the United States Patent and Trademark Office website at [uspto.gov](http://uspto.gov) and the U.S. Copyright Office at [copyright.gov](http://copyright.gov).

**Trade Events**

**Feria Internacional del Libro de Guadalajara**  
(Guadalajara International Book Fair)  

**Resources**

- National Publishing Industry Association (CANIEM):  [caniem.org](http://caniem.org)
- Indautor—National Institute of Copyrights:  [www.indautor.gob.mx/ingles](http://www.indautor.gob.mx/ingles)
- Mexican Center for Copyright’s Protection and Promotion (Cempro):  [cempro.com.mx](http://cempro.com.mx)
New Zealand

Summary
Reading is encouraged at an early age in New Zealand resulting in one of the highest reading achievement rates globally. Book selling is a competitive business as new technologies change how consumers purchase and/or read books, resulting in traditional booksellers facing challenges from online shopping and the rise of e-books. Market size is difficult to estimate as trade data that includes e-books and online booksellers is not collated. In 2011, New Zealand’s physical book imports (HS code 49) totaled US$315 million and physical book exports totaled US$46 million. In 2011, New Zealand’s imports of U.S. physical books totaled US$38.8 million. During this period, the United States was the third most important source of physical books after Australia and the United Kingdom. New Zealand booksellers are experiencing a decrease in physical book sales.

Market Entry
U.S. companies are advised to establish a local sales presence. The New Zealand book market comprises of educational, library, and consumer categories. New Zealand’s universities and libraries are publicly funded. U.S. educational texts, particularly in computers/technology, science, and business, are important to local universities.

Approximately 90% of the local retail market is handled by the top 30 (mainly multinational) publishing companies. Booksellers in New Zealand represent New Zealand’s book retailers. Whitcoulls

Statistics
Capital: Wellington
Population: 4.4 million
GDP: USD 123.3 billion
Currency: New Zealand Dollar (NZD)
Language: English (official), others

Contact
Janet Coulthart
Commercial Specialist
janet.coulthart@trade.gov
64 (4) 462-6002
(whitcoulls.co.nz) is New Zealand’s largest book retailer, and was one of the first local retailers to offer online shopping including e-book options. Whitcoulls collates a top 100 book sellers list (whitcoulls.co.nz/top-100). Nielsen Bookscan provides a weekly breakdown of books sold in New Zealand (booksellers.co.nz/book-news/nzs-bestsellers).

Parallel importing, which allows for the import and selling of products (usually branded) without the need to work with the local supplier, is legal in New Zealand.

**Current Market Trends**

Smart devices, (includes tablets, smart phones and Kindles) are popular gifts and end users are embracing applications provided by the new technologies.

IDC New Zealand’s mobile research report records that smart phone ownership by households has jumped from 13% in 2011 to around 44% in 2012. A Thomson Reuters survey shows baby boomers are leading the race to acquire tablet devices in New Zealand. The same survey found that 17% of 540 professionals participating in the survey used their table to read books. Booksellers New Zealand’s analysis found that the average reader of e-books has read 24 books in the past 12 months, compared with an average of 15 books by non e-book readers. E-books are less expensive to buy than physical books.

The New Zealand Association of Public Library Managers (APLM) has brokered a nationwide deal to offer e-books and other digital media in public libraries, with OverDrive, a U.S. service provider, specializing in public library lending. The libraries have made significant savings in setting up the technical infrastructure required to integrate the lending system into their websites. Implementation of this project is underway at about 40 library systems across the country. A local initiative developed by library and educational book supplier Wheelers is currently trialing its homegrown e-book lending service with the Tauranga and Hamilton library districts. The key differences between the two services will be whether patrons pay to borrow some of the titles, or borrow all titles for free; currently, OverDrive does not support the option of charging rentals for titles, and the Wheelers’ service does.
Technology in New Zealand classrooms grows annually. Some schools are publicly announcing intentions to issue 2013 students with their own computer tablets. This will result in students and teachers using the Internet more for reference material.

**Main Competitors**

New Zealand’s publishing industry mainly focuses on New Zealand authors. The Book Publishers Association ([bpzan.org.nz](http://bpzan.org.nz)) estimates 600 titles were sold internationally in 2012. Market share data completed by Nielsen found that international authors (imports) dominate the local market in three key categories:

- Fiction: International, 97%; New Zealand 3% market share
- Non-fiction: International, 68%; New Zealand 32% market share
- Children’s: International, 85%; New Zealand 15% market share

New Zealand’s published titles are estimated to account for 16% of the market’s volume and 20% of its value. The New Zealand Book Council ([bookcouncil.org.nz](http://bookcouncil.org.nz)) represents New Zealand authors.

Australia is New Zealand’s nearest neighbor and most important trading partner. In 2011, Australian physical book imports (HS Code 49) totaled approximately USD 128 million, representing 40% market share. Due to the small size of local book orders, some U.S. publishers choose to combine orders with Australian orders to reduce shipping costs.

The United Kingdom is New Zealand’s second most important market for physical book imports. In 2012, U.K. books represented approximately 20% of the import market.
**Current Demand**

The popularity of smart devices in New Zealand will continue to increase the demand for e-books. Physical books are popular gift items and Christmas is the most important time of the year for retailers but overall the New Zealand market for physical books is likely to continue to fall.

Online sales will continue to be popular. Amazon and other international online booksellers typically offer physical books inclusive of shipping at cheaper rates than local booksellers. This is partly because online sales do not include New Zealand’s 15% Goods and Services Tax. New Zealand Post, this country’s national provider of postal services is due to open an office in Oregon, USA. This will allow New Zealand customers to purchase from other U.S. online books vendors that do not ship to this country.
Qatar

Summary
Qatar plays an important role in the region’s development of the printing and publishing sectors. The country has one of the fastest growing economies in the world, posting 6.6% real GDP growth expectancy for 2012, and a population boom that has added one million people since 2005, according to the World Bank.

Qatar has experienced rapid economic growth over the last several years and consequently enjoyed a budget surplus for eight consecutive years. The country has the highest GDP per capita in the world, estimated by the World Bank at over $98,000 per capita. Qatar enjoys high literacy rates for both men and women, which is estimated by the United Nations Public Administration Network (UPAN) index to be at 94.7 percent as of February 2012.

Furthermore, in recent years Qatar has dedicated significant resources to education and the Ministry of Education has made grades K–12 mandatory for all citizens. There are approximately 300 schools in Qatar, including private, independent and specialty schools. Most curriculums are taught in English, followed by Arabic. Additionally, there are 10 universities in Qatar, serving approximately 12,480 students.

Current Market Trends
There is a strong appetite for US publications, given the wealthy local Qatari end-users, interest in US culture and education and burgeoning expatriate population. The largest demand by

Statistics
Capital: Doha
GDP: USD 174.9 billion
Currency: Riyal
Language: Arabic (official), English

Contact
Anissa Lahreche
Commercial Specialist
anissa.lahreche@trade.gov
+974 4496 6040
expatriates is for novels. Qatari nationals, however, are more interested in acquiring educational books including those on healthcare, beauty, fitness and cooking.

The publishing sector offers opportunities but with the condition that they fit into the educational and cultural goals of the Ministries. The government is investing significant resources to train Qatari youth to enable them to become entrepreneurs and qualified professionals in the economy.

Best prospects include:

- English Language Books/CDs
- Children’s Books Stories
- History Books
- Novels
- Best Sellers
- Art
- Career Development Books/ Human Resources
- Business

Healthcare is a priority concern for the Qatari leadership. In the recent years, the government has put great emphasis on training aimed at improving the overall health care, as well as providing quality education in trauma management, disaster management and public awareness. Therefore, health and fitness, diet, nursing, self esteem, spiritual and medical books sell well in the market.

Concerning barriers to market entry, U.S. publishers must be aware that censorship exists in Qatar. Censorship in Qatar includes filtering pornography, political criticism of Gulf Countries, material deemed hostile to Islam and gay and lesbian content.

**Current Demand**

**Local Periodicals**

The country has a number of local Arabic and English publications. Some daily Arabic newspapers have corresponding English equivalents under different names. Qatar also has numerous Arabic and English monthly periodicals, which have been increasing with Qatar’s commercial market.
### Daily Newspapers in Qatar

<table>
<thead>
<tr>
<th>Publisher</th>
<th>Arabic Name</th>
<th>Circulation</th>
<th>English Name</th>
<th>Circulation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dar Al Oroba</td>
<td>Al Arab</td>
<td>8,000</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Gulf Publishing &amp; Print Co.</td>
<td>Al Raya</td>
<td>25,000</td>
<td>Gulf Times</td>
<td>30,000</td>
</tr>
<tr>
<td>Dar Al Sharq</td>
<td>Al Sharq</td>
<td>35,000</td>
<td>The Peninsula</td>
<td>30,000</td>
</tr>
<tr>
<td>Ali Bin Ali-Dar Al Watan</td>
<td>Al Watan</td>
<td>20,000</td>
<td>Qatar Tribune</td>
<td>10,000</td>
</tr>
</tbody>
</table>

### Arabic Monthly Periodicals in Qatar

<table>
<thead>
<tr>
<th>Name</th>
<th>Type</th>
<th>Circulation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Layalina</td>
<td>Social Events</td>
<td>15,000</td>
</tr>
<tr>
<td>Jamila</td>
<td>Lifestyle</td>
<td>25,000</td>
</tr>
<tr>
<td>Tijara wal Aamal</td>
<td>Business</td>
<td>24,000</td>
</tr>
<tr>
<td>Nabdh Al-Hayat</td>
<td>Healthcare—Hamad Medical Corporation</td>
<td>10,000</td>
</tr>
</tbody>
</table>

### English Monthly Periodicals in Qatar

<table>
<thead>
<tr>
<th>Name</th>
<th>Type</th>
<th>Circulation</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABODE</td>
<td>Lifestyle</td>
<td>15,000</td>
</tr>
<tr>
<td>Marhaba</td>
<td>Guide to Qatar</td>
<td>24,000</td>
</tr>
<tr>
<td>Oryx Publications*</td>
<td>Business &amp; lifestyle, women, style/fashion</td>
<td>-</td>
</tr>
<tr>
<td>Sur La Ter</td>
<td>City lifestyle, fashion, travel</td>
<td>12,000–15,000</td>
</tr>
<tr>
<td>Time Out Doha</td>
<td>Dining, events, entertainment</td>
<td>-</td>
</tr>
<tr>
<td>Villagio Magazine</td>
<td>Villagio Mall events</td>
<td>-</td>
</tr>
</tbody>
</table>

Qatar Today, Qatar Al Youm, Women Today, GLAM
U.S. Export to Qatar

In 2011, U.S. export of publications to Qatar numbered 460,641 units, totaling USD 5,053,354. The highest revenues came from printed books, textbooks, and technical, scientific, and professional books.

### U.S. Export of Publications to Qatar, 2011

<table>
<thead>
<tr>
<th>Type</th>
<th>Value (USD)</th>
<th>Quantity</th>
<th>Unit Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Printed Books/brochures/leaflets Etc, single Sheets (kg)</td>
<td>129,165</td>
<td>3,724</td>
<td>34.68</td>
</tr>
<tr>
<td>Dictionaries (including Thesauruses) (no)</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Encyclopedias And Serial Installments Thereof (no)</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Textbooks (no)</td>
<td>1,348,966</td>
<td>37,106</td>
<td>36.35</td>
</tr>
<tr>
<td>Newspaper/journals/periodicals Bound Ex Paper, Set (no)</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Directories (no)</td>
<td>21,814</td>
<td>6,027</td>
<td>3.62</td>
</tr>
<tr>
<td>Bibles/testaments/prayer Books Oth Religious Books (no)</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Technical, Scientific And Professional Books (no)</td>
<td>1,521,329</td>
<td>31,204</td>
<td>48.75</td>
</tr>
<tr>
<td>Art And Pictorial Books Printed Not Single Sheets (no)</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Hardbound Books, Nesoi (no)</td>
<td>601,331</td>
<td>49,799</td>
<td>12.08</td>
</tr>
<tr>
<td>Rack Size Paperbound Books, Nesoi (no)</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Printed Matter Nesoi 49 Or More Pages Ea Ex Covers (no)</td>
<td>55,880</td>
<td>3,211</td>
<td>17.40</td>
</tr>
<tr>
<td>Newspapers, Journals, Periodicals, 4 Times A Week (kg)</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Newspapers Appearing Less Than Four Times A Week (kg)</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Business Etc Periodicals, Nesoi Single Issues Tied (no)</td>
<td>1,081,156</td>
<td>240,233</td>
<td>4.50</td>
</tr>
<tr>
<td>Journals/periodicals Nesoi, Incl Single Issues Tied (no)</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Children’s Picture, Drawing Or Coloring Books (no)</td>
<td>26,499</td>
<td>5,484</td>
<td>4.83</td>
</tr>
</tbody>
</table>
Governance
The Ministry of Culture, Arts, and Heritage manages all copyrights, trade names of radio materials, licensing for press publications, printing press, publishing houses, libraries and the establishment, importing and exporting publications and the distribution of artistic materials. Qatar sponsors varied cultural events through the Ministry of Culture such as festivals, seminars, lectures, arts exhibitions, workshops and training in cultural, arts and heritage domain.

The Qatar Media Law was adopted in 1979, and has since been amended four times. August 2012 saw the construction of an entirely new law, in efforts to remain in line with Qatar’s ever growing media, emedia and advertising sectors. The Ministry of Culture, Arts and Heritage oversee the law. When the Ministry of Information was dissolved in 1996 by the then newly appointed HH Shiekh Hamad bin Kalifa Al Thani, its responsibilities and departments were divided among various media focused ministries.

Trade Events

The Doha International Book Fair
www.moc.gov.qa/english
The Middle East region’s largest book fair, with participants from both the Middle East and Europe. The 21st Doha International Book Fair hosted exhibitors from 26 countries, including 348 publishers and 84 agents with a total of 28,755 titles in Arabic and 7,279 in other languages.
Russia

Summary
Russia’s book industry is valued between $2–3 billion per year. Over the past decade the number of titles published has doubled. This has been largely due to the low 10% VAT on books, government efforts to promote reading, and a desire by the Russian government to assist the publishing industry. Additional support includes developing regulations and the supporting infrastructure to encourage private ownership within the industry, which is now nearly 100% privatized. Currently, there are 1,300 active book publishers that each publish in the range of 10–20 books annually. This number has been steady for several years while the number of all registered publishers is about 6,000. About 2,500 publishers are located in the regions outside Moscow and St. Petersburg and are mainly university printing houses that publish educational literature.

Market Entry
There are very few specialized publishers; even medium sized publishers are standardized. A major part of the market is taken up by the two largest publishers, AST/EKSMO and the Atticus Group, who determine the situation in the Russian book market and compete fiercely with each other.

Book pricing in the Russian market is fundamentally different from in the West. Retailers don’t pay for the books until they have sold them, so it takes from six months to a year and a half to make a

Statistics
Capital: Moscow  
Population: 142.9 million  
GDP: USD 1.919 trillion (est.)  
Currency: Russian ruble (RUB)  
Language: Russian

Contact
Yekaterina Lushpina  
Commercial Specialist  
yekaterina.lushpina@trade.gov  
+7 495 728 55 56
profit. Meanwhile publishers have no control over retail prices and are poorly informed as to what is happening with actual sales.

There are very few foreign participants in the Russian market. In March 2011, Lagardere made headlines in Russia when it became the first foreign publisher to buy a major stake in a Russian publisher Atticus.

**Current Market Trends**

The number of titles produced annually in Russia continues to grow modestly. The country is now #3 in terms of book production (with approximately 125,000 new titles per year), after the U.S. and China. Educational literature is a key book market. The children’s segment also remains one of the brightest sectors in Russian publishing, occupying somewhere between 16% and 20% of the Russian publishing market, with industry experts predicting it to increase to 25%. Although the country is the world’s third largest producer of books, there is steady annual decline in readership. Growth of title production is coupled with the decline in sales volumes (-5.63% in 2009, -8.52% in 2010, -4% in 2011) and average book prices increased from $7.44 in 2008 to $8.47 in 2011. The absence of properly functioning distribution networks and the poor connections between different regions of the country are hindering market growth and book delivery. At the moment, 80 percent of books in Russia are sold in Moscow and St. Petersburg, with only 20 percent sold in the regions.

In 2012, negative trends in Russia’s book market have worsened comparatively to previous years and the market will shrink by another 9.53% in comparison with 2011. This trend is mainly the result of reduced specialized book retail, low investment activity of Russian publishing leaders, merging and consolidation of book publishing companies and reorientation of book retail stores. Volume of sales in 2013 is projected to fall by 4–6%.

Some experts are very optimistic about electronic book market development in Russia. Its 2012 volume was less than 1% of the total book market. In 2011, more than 20 million e-books were downloaded and there were about one million of reading devices sold.
Piracy is a major limiting factor. Nearly 90% of books are downloaded from pirate sites, which seriously undermines the entire book market. Internet penetration remains comparatively low at 47% average (higher in Moscow and St. Petersburg and lower in cities with the population less than 1,000,000). However, Russia will soon have more people using the Internet than any other market in Europe.

Main Competitors
The biggest publishers are AST, EKSMO and the Atticus group, owned by oligarch Alexander Mamut (who recently purchased the Waterstone’s in the UK). Two largest publishing companies, AST (9,466 titles and 64,549 copies) and EKSMO (8,988 titles and 67,549 copies) merged in June 2012. According to Oleg Novikov, EKSMO’s CEO, building such consolidated power was a life-saving measure given the scope of the challenges confronted by publishers and retailers in Russia. The group has distribution centers in all Russian regions, Ukraine and Kazakhstan. ACT and EKSMO also own major book chains through which they sell their own products. ACT controls Bukva (which means “letter”) while EKSMO runs Novaya Kniga (which means “A New Book”) and Bookvoed (located in Saint Petersburg).

The largest retail book chain TopKniga went out of business in 2011. Two largest remaining independent networks at the moment are Labyrinth and Barrister.

Other major industry players include Azbooka-Atticus (1,496 titles and 11,217 copies), Egmont (1,311 titles and 17,477 copies), Prosveshcheniya (1,305 titles and 60,893 copies), OLMA Media Group (1,286 titles and 8,897 copies), Rosman (1,146 titles and 9,997 copies), Ripol Classic (1,019 titles and 8,088 copies), Academia (938 titles), Drofa (879 titles and 18,072 copies).

All top-ten publishers are based in Moscow, with a handful located in St. Petersburg. While book retail is decreasing, nontraditional channels like FMCG (supermarkets), libraries, kiosks and book markets enjoy modest growth.
Current Demand
About 45% of Russians use various handheld devices. Online bookselling accounts for less than 10% of the market. Even though plastic payment cards are not new for the Russian economy (58% of Russians have at least one credit or debit card), the payment and billing system for delivering digital content requires much improvement. Barriers include poor logistical infrastructure, piracy and a challenging environment for online bookselling.

Trade Events

spbbooksalon.lenexpo.ru/en
Supported by Government of St. Petersburg Federal Agency for Print and Mass Communications, Russian Book Union, ExpoForum JSC. 2012 Book Fair attracted 233 exhibitors from 13 countries and 70,000 visitors.

Moscow International Book Fair
Moscow, Russia • mibf.ru/eng
36,000 m², 1541 exhibitors from 45 countries, more than 500 events, more than 200,000 titles in dozens of languages.

Publishing Expo
Moscow, Russia • press-expo.ru
Annual event for the Russian and international publishing business. Over 2,500 print media specialists. Focused on publishing, distribution/printing companies, advertising/paper industries, and products/services.

Resources
Singapore

Summary
Based on industry estimates, Singapore has over 2,600 companies involved in printing and publishing. Over 500 firms are directly engaged in the publishing of books, newspapers, magazines, periodicals, directories, and mailing/customer databases. The sector currently employs more than 6,000 employees and has a value-add of more than USD 900,000/1.3 million.

Singapore serves as the Asian headquarters of many top international publishers, including Reed Elsevier, John Wiley & Sons (Asia), McGraw-Hill Learning Education, Readers’ Digest Asia, Cambridge University Press, Sage Publishing, and Cengage Learning. To complement the publishing sector, the printing industry is equipped with the latest printing/publishing technologies and supporting customer service systems.

Market Entry
Singapore has excellent logistics services, advanced information communications infrastructure, and a strong IPR protection framework. U.S. publishers will find that this creates a transparent environment for business and expansion to other regional markets.

Current Market Trends
Singapore’s close proximity, both physical and cultural, to other major markets such as the India subcontinent and Southeast Asia

Statistics
Capital: Singapore
Population: 5.18 million
Currency: Singapore Dollar (SGD)
Language: English (business); Mandarin, Malay, Tamil

Contact
Luanne Theseira
Commercial Specialist
luanne.theseira@trade.gov
65/6476-9037
makes it an ideal hub for many international publishers. U.S. firms can leverage Singapore’s strategic position to springboard into the region.

Most major retailers source their books from local distributors and overseas suppliers. The more established booksellers also have publishing divisions that operate as separate entities, publishing and distributing titles to the local and regional markets. There has been tremendous growth in the online/web environment with several publishers developing their own e-commerce sites.

The Singapore Media Development Authority, together with key trade associations such as the Singapore Book Publishers Association and the Magazine Publishers Association of Singapore, play a pivotal role in shaping the industry and the island state is poised to serve as a springboard for U.S. firms seeking to tap the growing Asian region.

**Current Demand**

Within Asia, China continues to be one of the fastest growing economic markets, which has led to a corresponding surge in interest in Chinese language, culture and media content. Singapore also has a large Chinese population that is effectively bilingual. To this end, the potential partners in this island state are well-positioned to serve as a U.S. company’s strategic partner into China. Singapore and China have signed a free trade agreement that will enable printed books, newspapers, journals, picture books and maps to enter China tariff-free.

**Barriers**

Unfortunately for traditional bookstores, soaring rents and shrinking profits in the book business has led to several store closures. Bookstores such as Harris, Page One, and MPH—traditionally strong players in the bookstore business—have closed.

**Resources**

- Media Development Authority: [mda.gov.sg](http://mda.gov.sg)
- Magazine Publishers Association of Singapore: [mpas.org.sg](http://mpas.org.sg)
Spain

Summary
The Spanish book sector sold 286 million copies in 2011 and closed the year with a total turnover of €2.8 billion (USD 3.8 billion) in book sales, a 4.1 percent drop from 2010.

Total editorial production in Spain in 2011 was 83,258 titles, an increase of 4.3 percent from 2010, with an average circulation of 3,441 copies per title (349 copies less than the average circulation in 2010). This trend of increased editorials and decreased circulation has been occurring since 2007 in line with the increase in digital book formats.

Compared with other markets, the size of the e-book market in Spain continues to be quite small, with a turnover that totals only 2.8 percent of the whole industry. In 2011, e-book sales totaled €72.6 million (USD 101 million) which is 3 percent more than 2010 and 41.6 percent more than 2009. In 2011, the number of e-book titles available rose to 40,328, representing an increase of 243 percent over 2010 and 576 percent more than in 2009. In addition, 81,170 previously published works were digitalized.

Data for 2011 show audio books to be a minor segment of the overall Spanish publishing industry. Data for audio books is presumably factored into statistics for electronic/digital books. Lacking substantial data on this sector, it can still be safely assumed that the near absent adoption rate for audio books in Spain has allowed consumers (whom still overwhelmingly prefer...
paper publications) to skip directly to e-books as a preferred choice for non-traditional reading.

The sales volume for paperback books rose 4.8 percent from 2010, with a total turnover of €185.13 million (USD 258 million). The number of copies sold in 2011 increased by 4.2 percent over the previous year to 25.68 million copies.

If we look at the turnover numbers by subject, we can see that almost all of them have declined, particularly reference books with a decrease of 25.8 percent, adult literature with a decrease of 14.4 percent, technical, scientific and university texts with a decrease of 13.1 percent, and an overall decrease of 12 percent.

**Current Market Trends**

Dictionary and encyclopedia sales generated €64.5 million (USD 90 million) in turnover in 2011, a 25 percent fall from 2010. Books for children and adolescents accounted for 32 percent of the market and generated €337.6 million (USD 470 million) in 2011, a decrease of 3.7 percent from 2010. The sales of adult literature books generated a turnover of €551 million (USD 767 million) in 2011. In the last five years, this figure has fallen 17 percent. However, the number of edited titles of literature has increased 13.5 percent (15,488 titles) while the number of children and adolescent titles has stayed the same (12,299 titles).

The sales of non-university textbooks has recovered in 2011, with a turnover that generated €868 million (USD 1.2 billion) representing an increase of 6.2 percent. The turnover for social sciences and humanities books was €334 million (USD 465 million) representing a decrease of 2.1 percent over the previous year. This figure has fallen 5.2 percent since 2007. Sales of university textbooks and technical scientific books were worth €134 million (USD 186 million) in 2011. This number has diminished 13 percent since 2010 and by 24 percent since 2007.
Lastly, didactic books generated a turnover of €148.8 million (USD 207 million), up 17.9 percent from 2010. Comic books also generated 10.8 percent more with a turnover of €94.4 million (USD 131 million). This segment has increased 22.5 percent since 2007.

2011 data shows bookstores and bookstore chains are still the principal sales channels and make up over half of the total sales (55.5 percent). Bookstores increased their market share by 2.9 percent from 2010 while chains increased their market sales by 2 percent. Hypermarkets, convenience stores and newsstands are other key distribution channels. However, the Internet as a sales channel grew the most, with 32.2 percent more market share of sales than in 2010 and a total turnover of €20.8 million (USD 29 million).

Trade Events
The major Spanish tradeshow for the books sector is LIBER (Ligue des Bibliotheques Européennes de Recherche), the Association of European Research Libraries. LIBER has traditionally alternated between Madrid and Barcelona. This book trade fair is aimed exclusively at trade professionals and includes more than 12,000 professionals from 60 countries. Exhibitors include a diverse group of 800 graphic arts and multimedia companies, publishing organizations, literary agents and professional associations.

**Feria de Madrid (LIBER, the International Book Fair 2013)**

**Fira de Barcelona (LIBER, the International Book Fair 2014)**
[liber.es/en](http://liber.es/en)
Resources

Federation of Book Distributor Associations (FANDE—Federación de Asociaciones Nacionales de Distribuidores de Ediciones)
www.fande.es/fandeeng.asp
Association of book and periodical distributors in Spain.

Federation of Publishers’ Guilds of Spain (FGEE—Federación de Gremios de Editores de España)
www.federacioneditores.org/ingles
A non-profit, private professional association created in 1978 to represent, manage, enhance, and defend the general common interests of Spanish publishers on a national, European, and international level.
Turkey

Summary
The Turkish publishing market is steadily developing thanks to many factors: growth in population; lengthening of compulsory primary education to eight years, increase in the GNP, a variety of books becoming more available with the improved distribution network and the development of publishing technologies. In the last decade there has been a 300 percent increase in the number of published books with around 43,190 titles released in 2011 according to the Turkish Ministry of Culture. In 2011, the book-publishing sector reached a sales volume of 1.5 billion dollars.

The main market opportunities for U.S. publishers are in the imported books segment, which is calculated around $80 million. In addition, many international book titles are translated into Turkish, providing royalty payments to publishers. E-books are expected to quickly become an important market segment as well, with an annual growth rate of 120% since their first introduction into Turkey in 2010.

Market Entry
The direct imports of books into Turkey are typically handled by one of Turkey’s major book importers, sales agents, bookstore chains or online book stores. For translated books, cooperating with a Turkish publishing house or literary and copyright agency, which represents foreign publishers’ titles, would provide the easiest access to the market. Ideally, a partner should have

Statistics
Capital: Ankara
Population: 74.7 Million
GDP: USD 772.3 billion
Currency: Turkish lira (TRY)
Language: Turkish

Contact
Perim Akguner
Commercial Specialist
perim.akguner@trade.gov
+90 212 335-9197
experience in translations and an established distribution network. The publishing business of Turkey is based in Istanbul.

Turkish publishers frequently participate in major international book fairs in Europe, such as the Frankfurt Book Fair, London Book Fair, and Bologna Children’s Book Fair. These fairs provide opportunities to meet with Turkish publishers for possible cooperation.

**Current Market Trends**

In one of the largest educational projects in the world, the Ministry of Education in Turkey has initiated the FATIH (Movement to Increase Opportunities and Technology) Project in 2010 aiming to provide tablet computers to all K–12 students, to install smart boards in every classroom and to digitize every textbook. The project, with an expected cost of 10 billion dollars, is due for completion by the end of 2015 and will serve 17.5 million K–12 students. This project is expected to bring about huge changes in the publishing market and develop the e-book segment.

Turkish publishers initially had minimal interest in e-books, believing the market was not ready and worrying about the negative effects for published books. Turkey’s major online bookstore Idefixe first introduced Turkish e-books into the market in April 2010. Currently this is the fastest growing market segment (120% annually); in 2011 fifty Turkish publishing houses offered 1,314 titles in e-book format.

The internet is also growing in importance as a sales channel. Both international ([amazon.com](http://www.amazon.com)) and national ([idefix.com](http://www.idefix.com), [kitapyurdu.com](http://www.kitapyurdu.com), [dr.com.tr](http://www.dr.com.tr)) online bookstores are increasing their sales in Turkey.

**Main Competitors**

Some of the main suppliers in the imported books segment:

- Dunya Publishing represents 15 foreign publishing houses including Cambridge University Press, Houghton Mifflin, Klett Verlag, Cle International and Hachette.
- Dogan Books is part of the largest media group in Turkey, Dogan Media. Dogan-Egmont Publishing is a partnership between Dogan Group and the Danish Egmont Group operating in the distribution and sale of
children’s books. Dogan also owns the D&R book store chain. Its estimate total market share is 10%.


**Current Demand**

Turkey does not have a body that tracks sales in the publishing market. However the Turkish Publishers Association estimates total book sales in 2011 reached $1.5 billion with 43,190 book titles. 30–35% of the book titles are translations and about 95% of them are translated from English.

The Turkish market can be divided into the segments of educational books (textbooks, supplementary books), cultural publications (fiction and non-fiction titles such as novels, hobby books etc), academic books (university and professional publications) and imported books (foreign language books). All the market segments are experiencing growth. About 31 percent of the books sold are cultural publications and 54 percent of the market consists of books related to education, language training, and academic study.

<table>
<thead>
<tr>
<th>Turkey Publishing Sector</th>
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<tbody>
<tr>
<td>Market Segment</td>
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<tr>
<td>--------------------------</td>
</tr>
<tr>
<td>Educational Books</td>
</tr>
<tr>
<td>Textbooks</td>
</tr>
<tr>
<td>Supplementary Books</td>
</tr>
<tr>
<td>Academic/Professional Books</td>
</tr>
<tr>
<td>Cultural Publications</td>
</tr>
<tr>
<td>Imported Books</td>
</tr>
<tr>
<td>Total</td>
</tr>
</tbody>
</table>

Source: Turkish Publishers Association
Barriers
Piracy continues to be a major barrier for the publishing sector in Turkey. Turkish Publishers Association states that the market size would be 30 percent larger if the piracy of books could be controlled. According to Law No. 5846 on Intellectual and Artistic Works (revised in 2004), piracy is considered a public offense although enforcement of the law is weak. In 2011, law enforcement agencies conducted large-scale raiding operations against printing houses suspected of producing pirated books and seized 2 million pirated school books, which demonstrates the severity of the problem.

Trade Events

International Istanbul Book Fair
Istanbul, Turkey • istanbulkitapfuari.com/en
In operation since 1982. The largest book fair in Turkey, backed by the Turkish Publishers Association. Mainly targets the public, with 450,000 attendees buying books from over 600 publishers.
United Kingdom

Summary
In 2011, the UK publishing industry reported sales of $23.5 billion and despite the ongoing economic uncertainty the sector was expected to generate sales of $25.7 billion in 2012, a growth of over 9%. The industry comprises three sectors—newspapers, books and magazines—with magazines accounting for the largest portion of the market in terms of volume (41%), followed by newspapers (34%) and books (25%). The most challenging issue in the near-to-medium term will be competing in an age of austerity—as consumer, corporate, and (especially) government spending is tightened. As a market with a high level of technological development the industry needs to decide how to maximize the potential of new media (digital) formats. The book sector is most competitively positioned, with many publishers already digitizing backlists (previous publications), launching thousands of e-books, exporting, and selling more titles online. However, this surge of activity has been offset to a degree by declining sales of hardbacks.

Since the 1960’s the UK publishing industry has seen a continuous succession of consolidation, and is today part of a global industry dominated by four major international groups—Hachette (France), Bertelsmann (Germany), Pearson (UK) and News Corporation (US). Together these generate over 50% of consumer sales. Other international groups focus on the educational, academic and professional sectors with Pearson, Reed Elsevier, Thomson, and the

Statistics
Capital: London
Population: 63.2 million
GDP: USD 2.43 trillion
Currency: Pound Sterling (£/GBP)
Language: English

Contact
Stewart Gough
Commercial Specialist
stewart.gough@trade.gov
+44 20 7894 0459
two large university presses, Oxford (OUP) and Cambridge (CUP), the market leaders.

Although there are over 20,000 active publishers in the UK, less than 2,300 were registered in 2007 for VAT (value added tax). 2,000 of these UK publishers had sales under $1.5 million, with only 85 having sales of over $7.5 million. More than two thirds of the entire UK publishing industry’s total sales come from just ten companies. Despite the large number of small independent publishers, multinational companies, as mentioned above, dominate the industry.

Over the last ten years the UK book sector has undergone a transformation with books available in numerous outlets, from garden centers to Starbucks, to the more recognized retail chains (e.g. WH Smith, Waterstones, etc), supermarkets (e.g. Tesco, ASDA, etc), and internet retailers (e.g. Amazon). Competition is fierce and favors retail chains, internet retailers and supermarkets over independent booksellers.

Current Market Trends

The history of UK consumers as avid purchasers of books, newspapers and magazines is radically changing. Newspapers have seen their traditional client base, those who have been buying all their adult life, slowly disappear. Reading a newspaper over the morning breakfast has little appeal in a digital age. Readers now prefer different methods of accessing information, especially digital media sources on the internet. The newspaper sector collectively now has more than 1,500 websites.

Sales in national and regional newspapers continue to decline, with the fall accelerating everywhere except among the national Sunday newspapers. In 2000, the United Kingdom’s 10 largest newspapers combined sold 22 million copies per day. That number has now fallen to 13 million, and will likely continue to decline. The newspaper sector, more than any other part of the publishing industry, has seen massive cost cutting at all levels, and this is projected to continue.
Magazines suffer from an overabundance of titles and inflated cover prices. This has created a backlash from consumers who feel cover prices are too high and stop buying, switching instead to content from digital media sources. Increasing advertising revenues, utilizing different formats, how to charge for digital editorial content and embracing new technologies are areas facing magazine publishers in both short and long term.

Overall sales of retail books are forecast to decline by 1.3% through 2012–13, due to lower domestic sale of physical books. However, this will be offset by growth in sales of e-books and growth in export sales.

Main Competitors
The UK publishing industry ranks fifth in the world in value behind those of USA, Japan, China, and Germany. The UK’s main competitor by volume is China.

Current Demand
The UK publishing industry is one of the most productive in terms of new title output, producing over 100,000 new titles a year. This is similar to both the U.S. and China but substantially ahead of Japan, Germany and Russia, and even further ahead of France, Italy and Spain. Consumer books dominate the UK market in terms of value and volume.

<table>
<thead>
<tr>
<th>Source</th>
<th>% Volume</th>
<th>% Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chain Bookshops</td>
<td>30.3</td>
<td>37.5</td>
</tr>
<tr>
<td>Independent Bookshops</td>
<td>4.5</td>
<td>5.4</td>
</tr>
<tr>
<td>Bargain Bookshops</td>
<td>8.1</td>
<td>3.7</td>
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<tr>
<td>Supermarkets</td>
<td>13.6</td>
<td>10.0</td>
</tr>
<tr>
<td>Other retail</td>
<td>11.2</td>
<td>7.7</td>
</tr>
<tr>
<td>Direct Mail/book clubs</td>
<td>6.1</td>
<td>6.3</td>
</tr>
<tr>
<td>Internet-only retailers</td>
<td>26.1</td>
<td>29.5</td>
</tr>
<tr>
<td>Total Books</td>
<td>100</td>
<td>100</td>
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</table>

Source: Turkish Publishers Association
Books, rather than newspapers or magazines, offer the greatest prospect within the UK publishing industry, especially e-books. In sectors such as scientific and technical publishing, electronic delivery of texts is now common and this trend is expanding fast in other sectors such as educational and training publishing. Consumer publishing is still dominated by print, demonstrating the continued importance of a strong ‘high street’ sector, but this form of traditional publishing is under threat from new digital technologies such as the Amazon Kindle, Sony Reader, Apple iPad, and other e-readers. Consumer e-book sales increased by 366% in 2011. The trends in e-books and other digital formats are expected to grow, with public libraries seen as a natural market.

**Barriers**

No legal barriers exist for new entrants to the UK publishing industry, be they companies or individuals, nor are there any controls on foreign investment. Anyone entering the UK is subject to legislation covering intellectual property, monopolies against the public interest, libel and obscenity, but overall the UK publishing industry is among the most open in the world both commercially and intellectually. Issues affecting the industry are discounting and copyright infringement.

This is the policy of discounting between publishers, wholesalers and retailers, and the extent to which retailers or direct sales organizations pass on some discount to the ultimate consumer. There is no longer a fixed price for books in the UK, but most titles carry a recommended retail price (RRP). The discounts given by publishers vary according to the publishing sector, with higher discounts given to consumer books, especially mass-market titles, rather than academic or schoolbooks. They also vary by customer, with chains and supermarkets receiving higher discounts than independent booksellers. This creates an imbalance making it more difficult for the small independent bookseller to compete as margins have to be cut even further in order to match prices offered by chains (WH Smith etc) or supermarkets (Tesco, ASDA etc). This is a challenge for the 3,000+ independent bookshops, and with the advent of e-books as an additional challenge, many face an uncertain future.
Intellectual Property Rights
Copyright law in the UK generally covers all original literary, dramatic, musical or artistic works, sound recordings, films, broadcasts and cable programs, and typographical arrangements. In some instances it also covers databases, computer programs, and material on the Internet. Protection runs for 70 years after the death of the creator irrespective if the work is ink on paper or digitally stored. In UK law, copyright is included in the 1988 Copyright, Designs & Patents Act, though this has been amended in recent years to equate with existing EU law, most notably the EU 1995 Directive. This was updated in 2001 to take into account the growing challenge from electronic infringements. The UK patent office is the official source for all policy and legislation for patents, designs, copyrights and trademarks. Further information on Copyright can be found at ipo.gov.uk.

Other ‘rights’ that are found in the UK are commercial rights, language rights, territorial rights, subsidiary rights, moral rights, various forms of electronic rights, and the Public Lending Right.

Trade Events

London Book Fair
April • londonbookfair.co.uk
A global marketplace for rights negotiations and the sale and distribution of content across print, audio, TV, film, and digital channels. Over 25,700 visitors from 133 countries came to the 2012 fair.
Resources

- The Publishers Association: publishers.org.uk
- UK Department for Business Innovation and Skills: bis.gov.uk
- The Booksellers Association: www.booksellers.org.uk
- The British Library: bl.uk
- The Independent Publishers Guild: ipg.uk.com
- Periodical Publishers Association: ppa.co.uk
- UK Association of Online Publishers: ukaop.org.uk
- The Copyright Licensing Agency: cla.co.uk
# Office Locations

The U.S. Commercial Service Global Publishing, Media & Entertainment Team supports the international expansion of the U.S. publishing industry. Our worldwide network of trade specialists is located throughout the U.S. and in U.S. Embassies and Consulates around the world. We can help you identify and evaluate international partners, navigate international challenges, create market entry strategies, and offer a wide variety of export-related guidance. The Publishing Team helps to expand your international presence using book fairs, and introducing you to country experts and international buyers.

For more information about how we can help you, please contact one of our local offices or visit [export.gov/industry/paper](http://export.gov/industry/paper).

## U.S. Offices

<table>
<thead>
<tr>
<th>Alabama</th>
<th>California</th>
<th>Florida</th>
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<tbody>
<tr>
<td>Birmingham</td>
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**District of Columbia**

Served by Arlington, VA
Kansas
Wichita

Kentucky
Lexington
Louisville

Louisiana
New Orleans
Shreveport

Maine
Portland

Maryland
Baltimore

Massachusetts
Boston

Michigan
Detroit
Grand Rapids
Pontiac
Ypsilanti

Minnesota
Minneapolis

Mississippi
Jackson

Missouri
Kansas City
St. Louis

Montana
Missoula

Nebraska
Omaha

Nevada
Las Vegas
Reno

New Hampshire
Portsmouth

New Jersey
Newark
Trenton

New Mexico
Santa Fe

New York
Buffalo
Harlem
Long Island
New York
Rochester
Westchester

North Carolina
Charlotte
Greensboro
Raleigh

North Dakota
Fargo

Ohio
Akron
Cincinnati
Cleveland
Columbus
Toledo

Oklahoma
Oklahoma City
Tulsa

Oregon
Portland

Pennsylvania
Harrisburg
Philadelphia
Pittsburgh

Puerto Rico
San Juan

Rhode Island
Providence

South Carolina
Charleston
Columbia
Greenville

South Dakota
Sioux Falls

Tennessee
Knoxville
Memphis
Nashville

Texas
Austin
El Paso
Fort Worth
Grapevine
Houston
McAllen
Midland
San Antonio

Utah
Salt Lake City

Vermont
Montpelier

Virginia
Arlington
Richmond

Washington
Seattle
Spokane

West Virginia
Charleston
Wheeling

Wisconsin
Milwaukee

Wyoming
Served by Denver, CO
International Offices

Afghanistan
Kabul

Algeria
Algiers

Argentina
Buenos Aires

Australia
Perth
Sydney

Austria
Vienna

Belgium
Brussels

Brazil
Belo Horizonte
Brasília
Recife
Rio de Janeiro
São Paulo

Bulgaria
Sofia

Canada
Calgary
Montreal
Ottawa
Toronto

Chile
Santiago

China
Beijing
Chengdu
Guangzhou
Shanghai
Shenyang

Colombia
Bogotá

Costa Rica
San José

Croatia
Zagreb

Czech Republic
Prague

Denmark
Copenhagen

Dominican Republic
Santo Domingo

Egypt
Cairo

El Salvador
San Salvador

European Union
Brussels

Finland
Helsinki

France
Paris

Germany
Berlin
Düsseldorf
Frankfurt
Munich

Ghana
Accra

Greece
Athens

Guatemala
Guatemala City

Honduras
Tegucigalpa

Hong Kong

Hungary
Budapest

India
Ahmedabad
Bangalore
Chennai
Hyderabad
Kolkata
Mumbai
New Delhi

Indonesia
Jakarta

Iraq
Baghdad

Ireland
Dublin

Israel
Tel Aviv

Italy
Milan
Rome

Japan
Osaka-Kobe
Tokyo

Jordan
Amman

Kazakhstan
Almaty

Kenya
Nairobi

Korea (South)
Seoul

Kuwait
Kuwait City

Lebanon
Beirut

Libya
Tripoli

Malaysia
Kuala Lumpur
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USA Pavilion

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