

## The Global eBook Report: Current Conditions & Future Projections

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### Summary and Key Findings

#### How ebooks are confronting the global with the local in international publishing

The **Global eBook** report provides an overview of internationally emerging ebook markets, with a unique set of data from a wide array of the best available sources, a thorough analysis and a synopsis of key global developments and a broad set of detailed references to both global and local actors, forming a resource for anyone interested in the globalization of digital (book) content production and dissemination.

The report offers a status on the **US** and **UK** markets as well as close ups on ebook markets as they take shape across **Europe, Brazil, China, India, Russia**, and in the **Arab** world. Thematic chapters focus on critical policy debates and on key driving forces, notably ebook bestsellers and pricing strategies across European markets, self-publishing, government regulation, piracy, and the expanding activities of the leading global players such as Amazon, Apple, Barnes & Noble, Google, and Kobo. Fundamental statistics on the more mature ebook markets in the US and UK serve as benchmarks, to help with the evaluation of data from all other market developments.

#### Key findings

Ebooks have become the most relevant driver for growth in international publishing markets, yet confronting local players and traditions with often overwhelming competition from a few global actors, notably Amazon and Apple. In the two largest ebook markets, the United States and the United Kingdom (both with a market share for ebooks of around 20% of trade sales, and 30% in fiction), the increase has plateaued. In the UK, in 2012, thanks to ebook sales, losses in print could be compensated from digital. But everywhere across continental Europe, readers have started to embracing ebooks, notably in fiction. Publishers in Germany see up to 15% of revenues from new

fiction titles to coming from digital, while various surveys report overall ebooks as contributing between 7 and 9%. Other markets, like France, Spain or Italy, see a continuous expansion of ebooks, in tandem with a growing penetration of devices, and tablets gaining over e-readers.

To assess trends and developments, more detailed observations, as documented throughout the **Global eBook** report, become more relevant though.

In the US, over 1,000 ebook titles had sold over 25,000 each by the end of 2012. In France, at 3.1% of market share for ebooks in 2012, one out of five readers says to have already read an ebook. In Sweden and Italy, hard DRM is not the best choice anymore for most publishers. On the crisis stricken Spanish book market, ebooks are taking off faster than elsewhere in Europe, with the most massive discounts against print in Europe.

Pricing is a strategic and complex issue altogether. Aside from summarizing recent legal debates in the US over the “agency model”, the Global eBook reports tracks the huge differences, and contradictory developments with regard to the cost of an ebook in different markets.

2013 witnesses a boom in both new startups - from specialized ebook publishers to new ebook community and streaming sites – to new alliances of major local players, aiming at confronting the takeover of their markets by the global giants Amazon and Apple. The Tolino platform in Germany has brought together the two leading book chains with a leader in telecommunication, similar to the Spanish Nubico, formed of the largest book club (and publisher) with a telco network.

Also in **China**, consortia between publishing and bookselling groups with networks emerge by bringing together the strongest domestic players, to limit the inroads from abroad. From **France** to **Brazil** to the **US**, the ebook platform Kobo is forming partnerships with local book chains and independents, to form alternatives to notably a predominance of Amazon.

Almost everywhere, market developments are complemented by controversial policy debates and regulatory efforts, thus emphasizing the deep impact of ebook developments on all aspects of the business and the culture of books and reading.

## **Media Partners**

The **Global eBook** report can dwell for research and dissemination on a unique network of media partners, including [Book Dao](#) (China), [Book Industry Magazine](#) (Russia), [buchreport](#) (Germany), [Dosdoce](#) (Spain), [Livres Hebdo](#) (France), [Svensk Bokhandel](#) (Sweden), [Publish News](#) (Brazil), [Publishers Weekly](#) (USA), [The Bookseller](#) (United Kingdom) as well as the [Frankfurt Academy / ConTec conference](#).

## **How and where to get the Global eBook report**

The **Global eBook** report is available in ePub, PDF and Mobi (Kindle) formats, for download at all major ebook platforms, and through links from [www.global-ebook.com](http://www.global-ebook.com) .

From October 1<sup>st</sup> until 31<sup>st</sup>, 2013, the download is free of charge.

From November 1<sup>st</sup>, 2013 on, the report will cost € 29.95.

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