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Content and Consulting

Global Publishing Monitor 2014

Report for the
International Publishers Association
(IPA)

Frankfurt Book Fair, Oct. 9, 2014

Global Publishing Monitor 2014 : About

Mapping the global book business through key data

- Research for IPA started in 2011

- Milestones

- ▶ 2012: Global Map

- ▶ 2013: 20 largest markets & context of other content industries

- ▶ 2014: 40 markets with data & break outs

Key identifiers

- ✘ Value of markets by consumer (= retail) prices
- ✘ Publishers' net revenues
- ✘ Number of new titles and re-editions per year
- ✘ Number of copies sold
- ✘ (ebook market evolution)
- ✘ (Employment in publishing)

Global Publishing Monitor 2014 : Key findings

Global Publishing Monitor 2014 : 10 largest markets

Country	Year	Net revenue (mLocCurr.)	Market Value (mLocCurr)	Market Value (m€)	Change (%) in LocCurr from prev. year
United States	2013	27021	37829 m\$ (est.)	27.400 €	0%
China	2013	77080	128928 mRMB	15.342 €	9%
Germany	2013			9.536 €	0%
Japan	2013		785100 mYen	5.409 €	-2%
United Kingdom	2013	3898	3240 m£	3.875 €	0%
France	2013			4.401 €	-3%
Italy	2012			3.110 €	-6%
Korea	2012		4191895 mWon	2.974 €	2%
Spain	2013			2.708 €	-10%
Brazil	2013	5359	7294 mR\$	2.239 €	8%

Global Publishing Monitor 2014 : 11+ largest markets

Country	Year	Market Value (m€)	Change (%)
Canada	2013 (est.)	2.100 €	
Turkey	2012	1.752 €	0%
India	2013 (est.)	1.680 €	
Russia	2013	1.582 €	-3%
Netherlands	2012	1.431 €	
Australia	2013 (est.)	1.373 €	ca. -20% since 2011
Poland	2013	1.025 €	0%
Mexico	2012	606m€ (Net rev.)	3%
Taiwan	2013	855 €	-4%
Switzerland	2012 (est.)	828 €	

Country	Year	Market Value (m€)	Change (%)
Sweden	2012	783 €	-4%
Austria	2013	761 €	
Norway	2013	743 €	3%
Indonesia	2013	415 M€ (Net.rev.)	16%
Thailand	2010	528 €	
Argentina	2013	477 €	
South Africa	2010	464 €	-4%
Czech Republic	2012	328m€ (Net rev.)	ca. 5%
Malaysia	2012	263 m€ (Net Rev.)	
Finland	2013	254 m€ (net rev.)	-3%

Global Publishing Monitor 2014 : 10 largest countries

Title production

Country	Year	NewTitles + re-editions	Change (%) against prev. Year	New titles per 1 million inhabitants	GDPpC (PPP)
United States	2013	304912	-2%	959	\$ 53.143
China	2013	444000	7%	325	\$ 11.904
Germany	2013	93600	3%	1156	\$ 43.332
Japan	2013	77910	-1%	613	\$ 36.315
United Kingdom	2013	184000	8%	2875	\$ 36.209
France	2013	66527	2%	1008	\$ 36.907
Italy	2012	61100	-4%	1002	\$ 34.303
Korea	2012	39767	-10%	795	\$ 33.140
Spain	2013	76434	-3%	1626	\$ 32.103
Brazil	2013	21085	1%	104	\$ 15.034

Global Publishing Monitor 2014 :

(Preliminary) Ranking by title production

Country	Year	NewTitles + re-editions	Change (%) against prev. Year	New titles per 1 million inhabitants	GDPpC (PPP)
United Kingdom	2013	184000	8%	2875	\$ 36.209
Taiwan	2013	42118	0%	1831	\$ 41.581
Slovenia	2013	3661	-36%	1831	\$ 27.915
Spain	2013	76434	-3%	1626	\$ 32.103
Georgia	2011	7736		1547	\$ 7.165
Czech Republic	2012	16600	1%	1509	\$ 27.344
Norway	2013	6373	-14%	1275	\$ 65.461
Australia	2013	28234	34%	1176	\$ 43.550
Germany	2013	93600	3%	1156	\$ 43.332
France	2013	66527	2%	1008	\$ 36.907

Global Publishing Monitor 2014 :

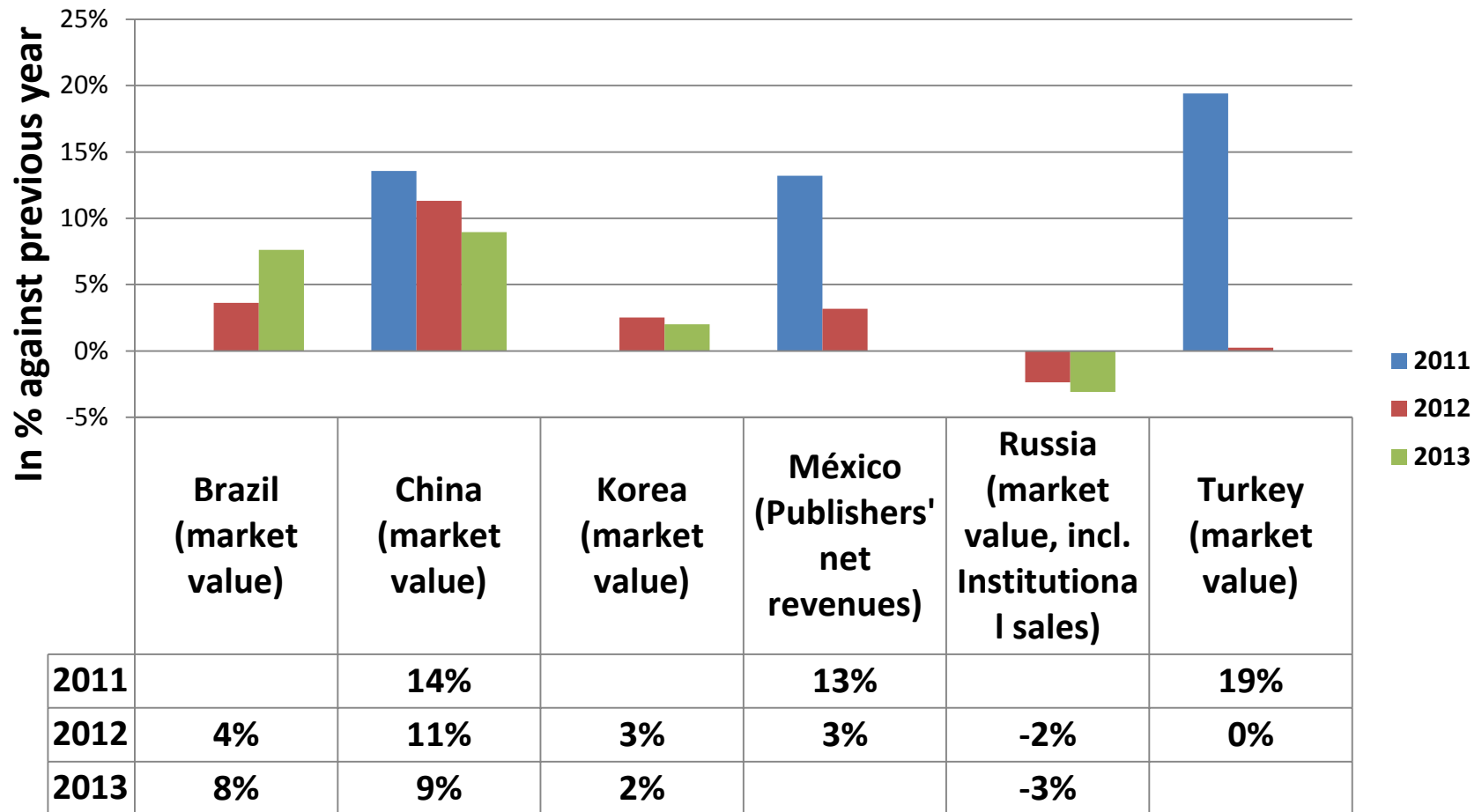
Title production in Latin America

Country	2012	2013	Change (%)
Latin America	188,389	194,009	3.0%
Argentina	27.661	27.757	0,3%
Bolivia	1.748	1.200	-31,4%
Brazil	85.360	85.809	0,5%
Chile	5.872	5.961	1,5%
Colombia	14.220	15.811	11,2%
Costa Rica	1.843	1.709	-7,3%
Cuba	3.099	3.199	3,2%
Dominican Republic	1.508	1.385	-8,2%
Ecuador	3.694	3.422	-7,4%

Country	2012	2013	Change (%)
El Salvador	495	627	26,7%
Guatemala	991	1.030	3,9%
Honduras	494	328	-33,6%
Mexico	27.751	29.474	6,2%
Nicaragua	129	328	154,3%
Panama	803	2.783	246,6%
Paraguay	1.169	865	-26,0%
Peru	5.972	6.491	8,7%
Uruguay	1.945	2.216	13,9%
Venezuela	3.635	3.614	-0,6%

Global Publishing Monitor 2014 :

Emerging economies



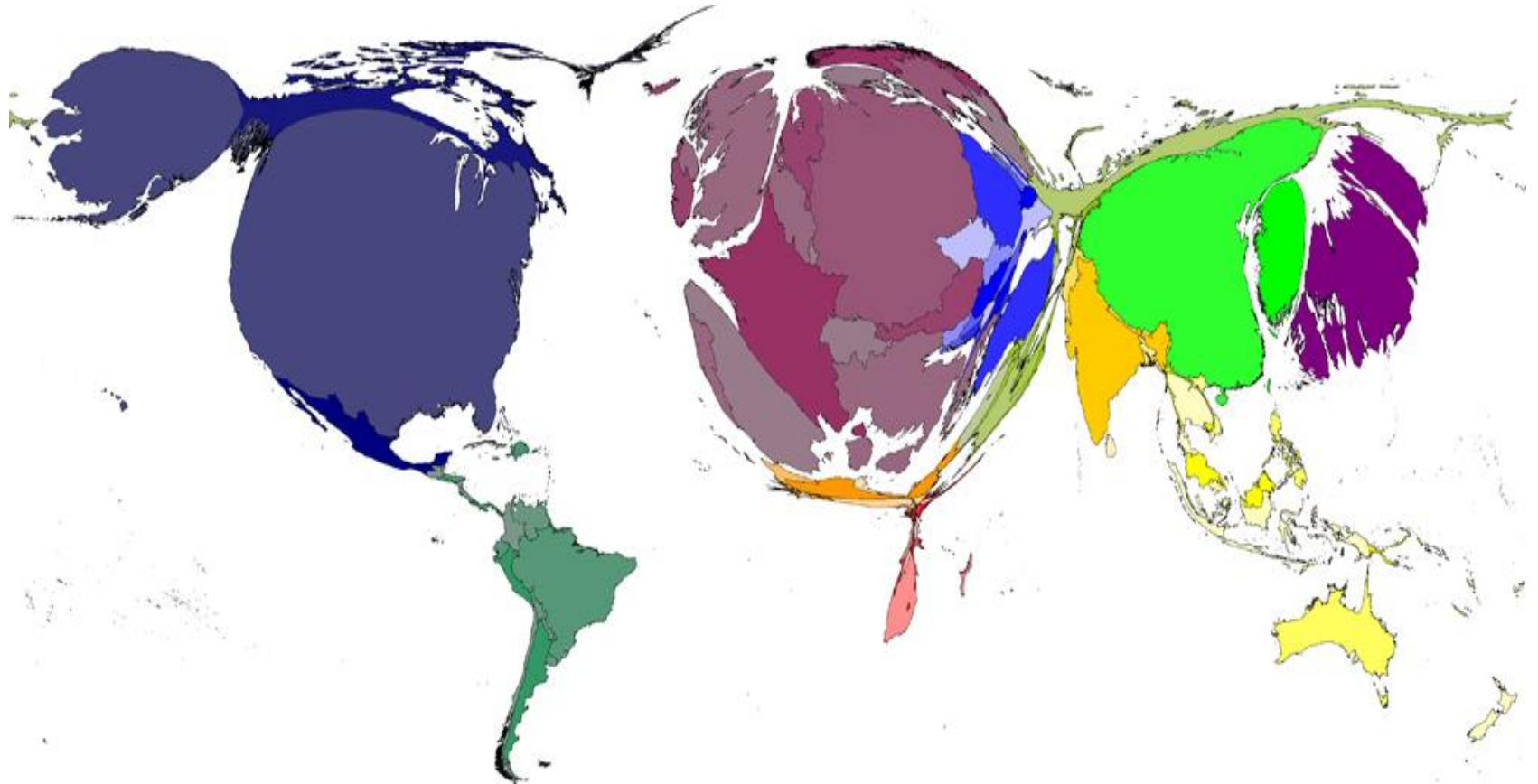
Market share of ebooks in selected markets (in %)

Source:
Global eBook

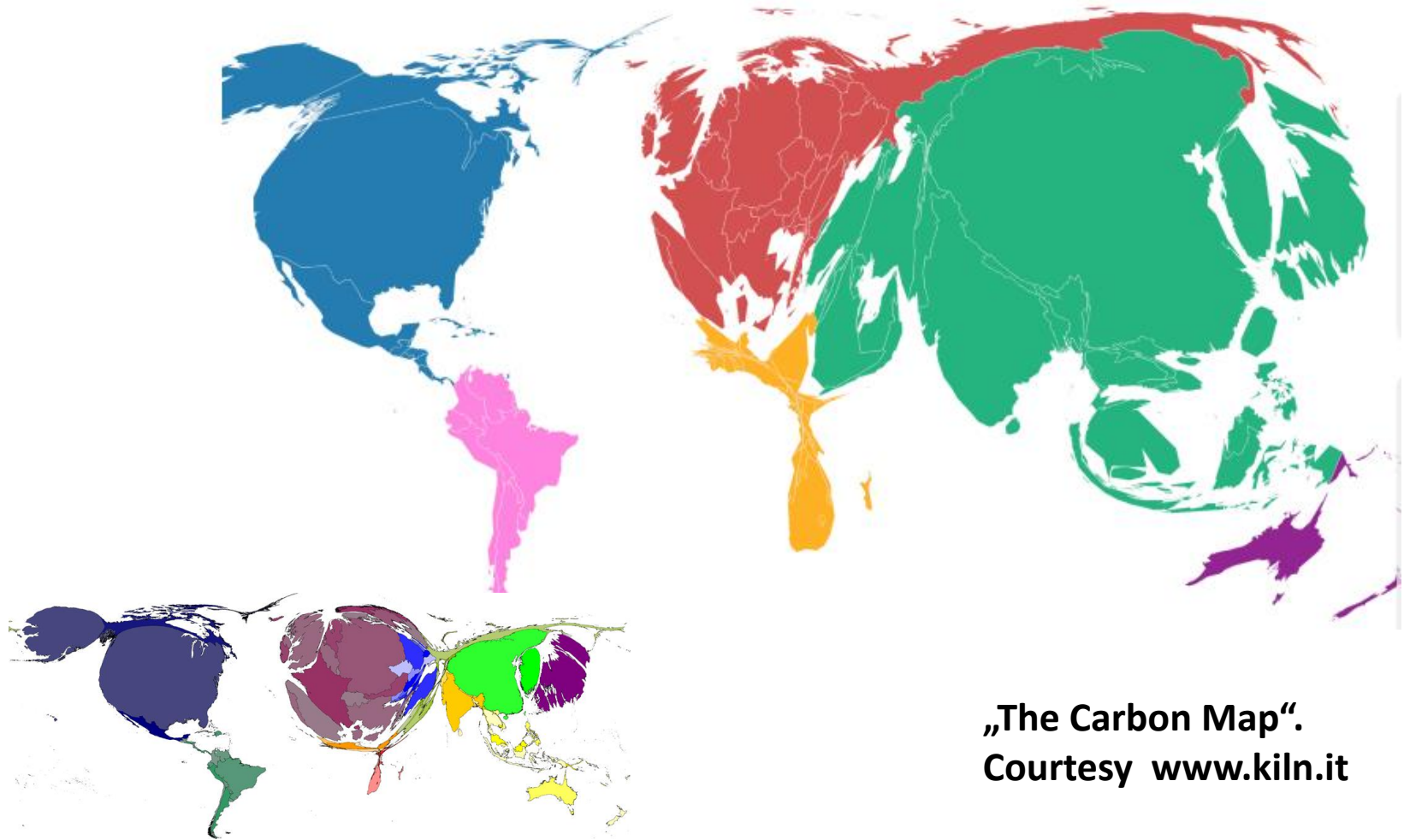
	% of total market	% of trade market	% in specific segments
US	13%	21%	Up to 50%
UK	11.5%	25%	40%
Germany	3.9%	9.4%	15 to 20%
France	1.5%	2.3%	10 to 15%
Spain	3 to 5%	8%	Up to 15%
Italy	n.a.	4 to 5%	Up to 40%
Netherlands	4.7%	10%	
Sweden	1%		70% libraries

Global Publishing Monitor 2014 : Contexts

A map of global publishing

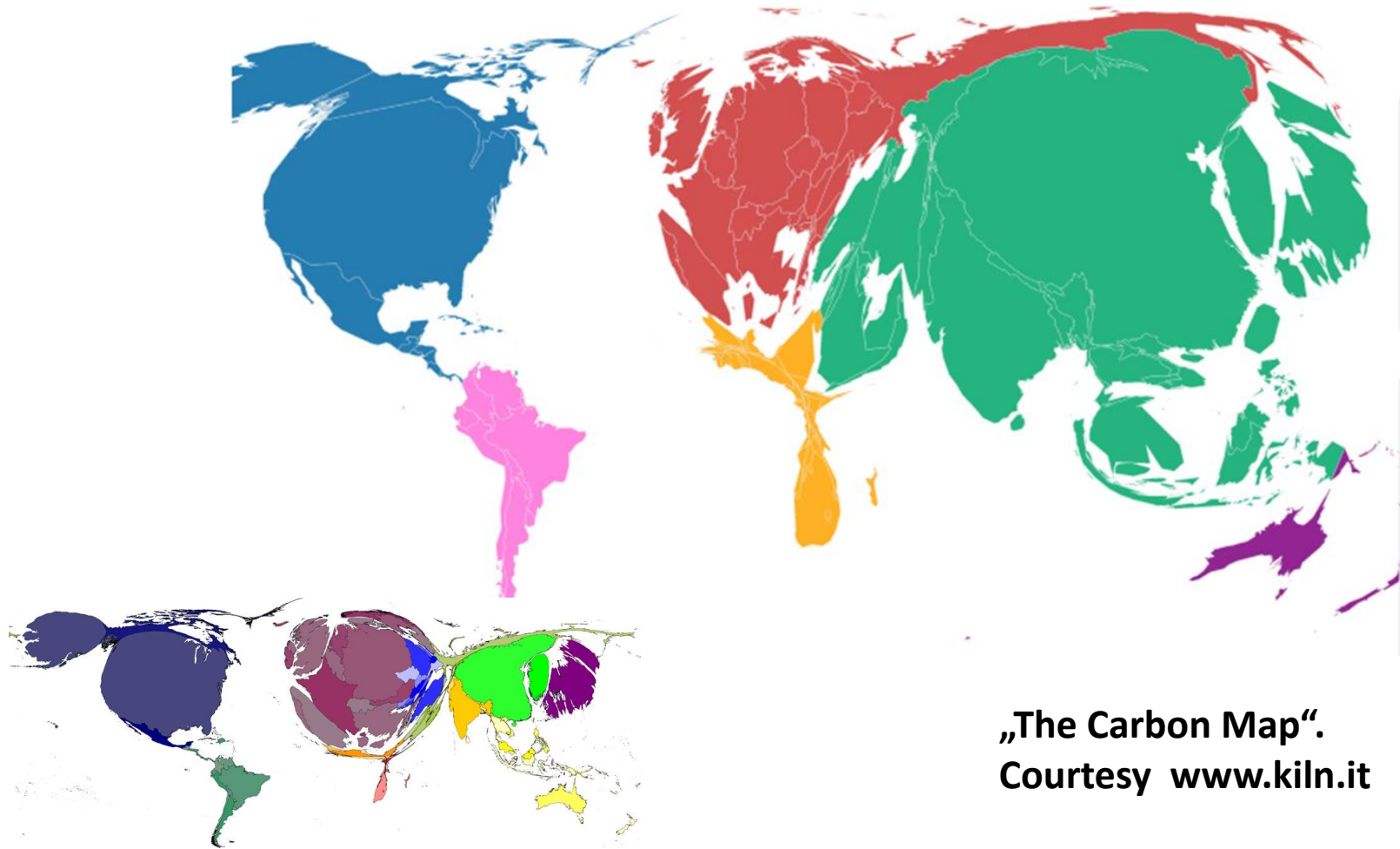


Global consumption of energy



„The Carbon Map“.
Courtesy www.kiln.it

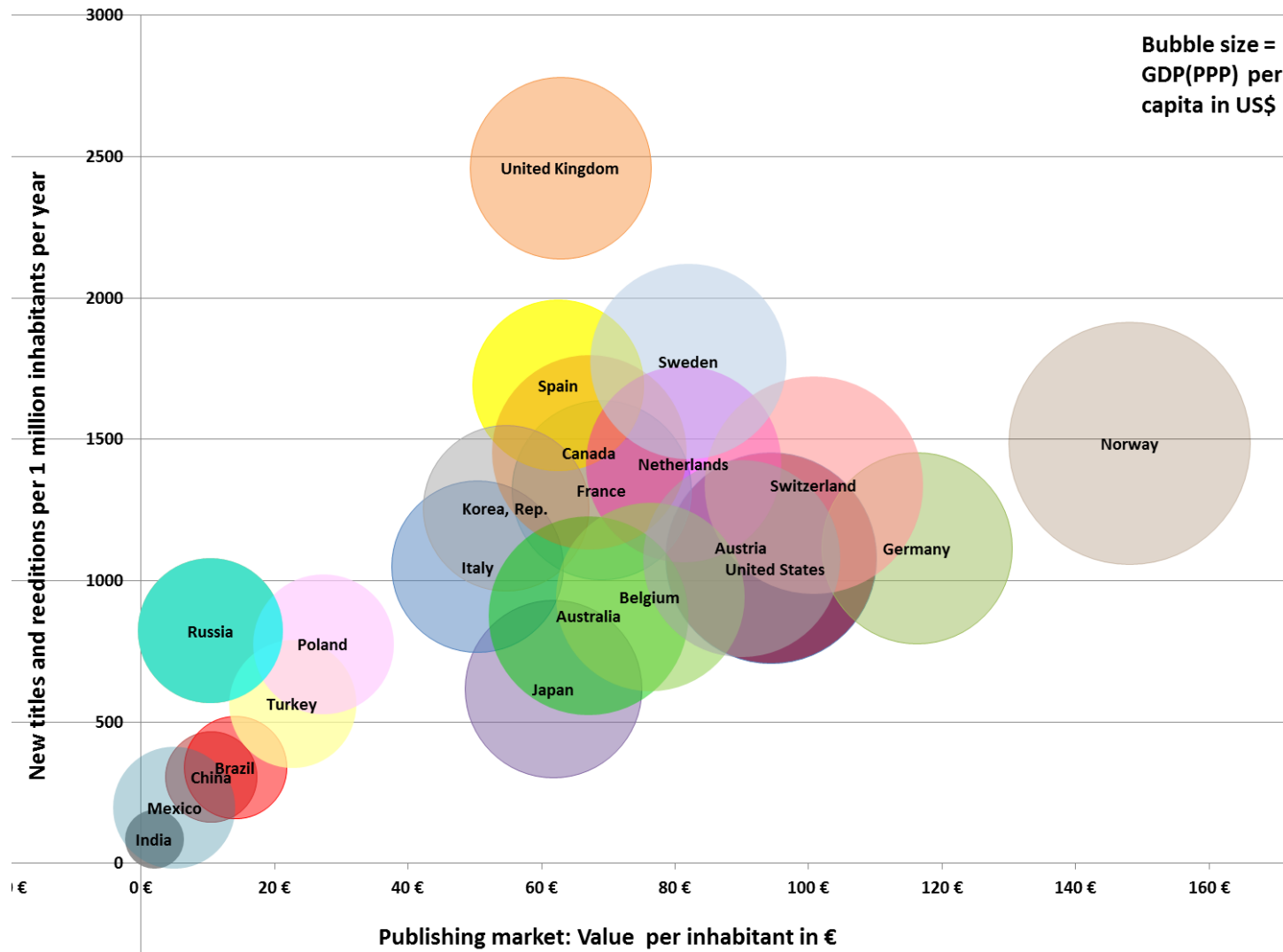
A map of global emissions



**„The Carbon Map“.
Courtesy www.kiln.it**

The „bookish“ elite

Market size & new title production in relation to GDP per capita
in the 23 largest publishing markets worldwide.



Global Publishing Monitor 2014 : Credits

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www.internationalpublishers.org

Thank you!

Research by

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Global eBook report

www.global-ebook.com