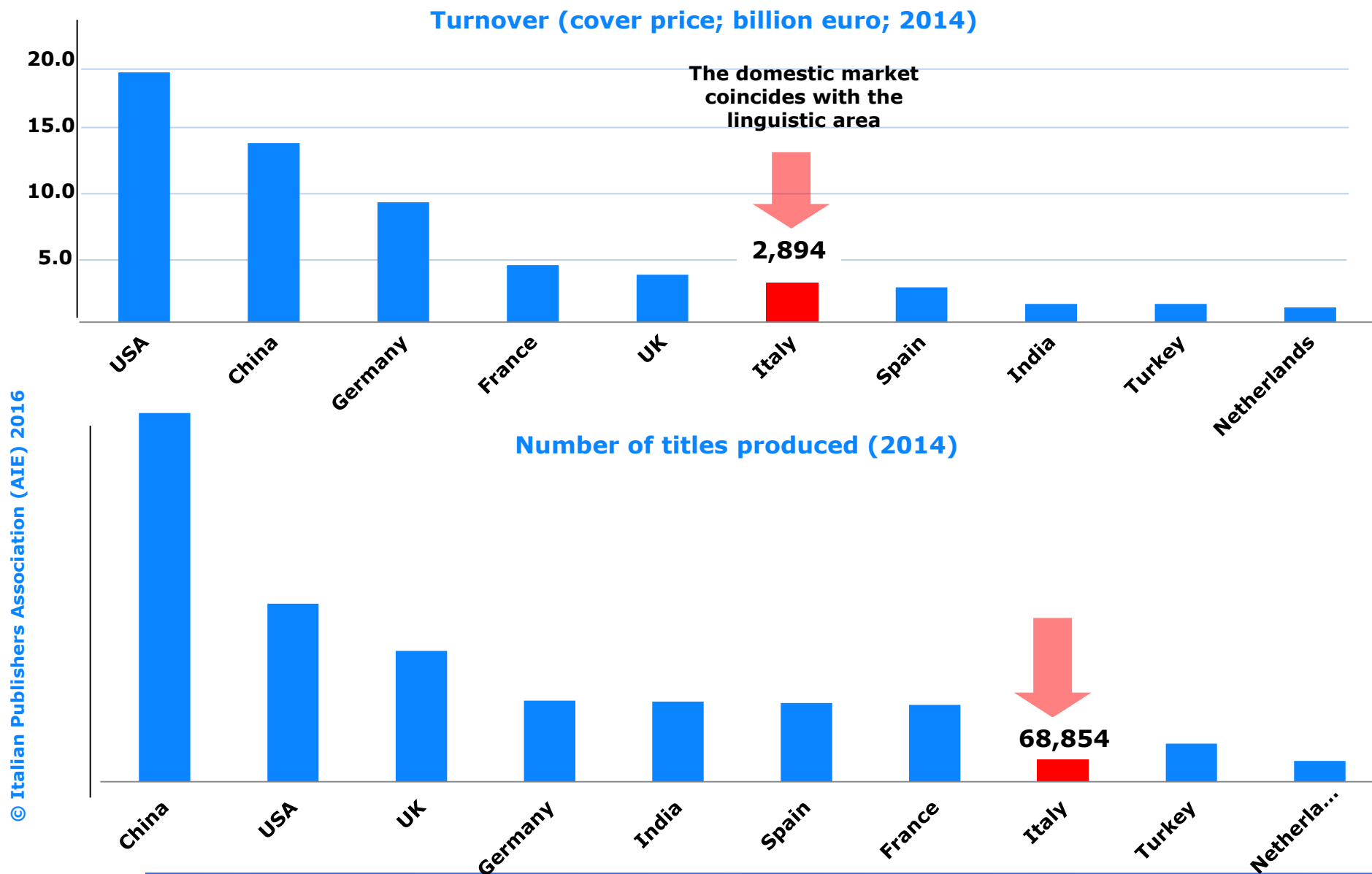# Italian Book Market An Overview

Alfieri Lorenzon – alfieri.lorenzon@aie.it

Key figures

The Italian market ranks worldwide for turnover/titles

Turnover (cover price; billion euro; 2014)

The domestic market coincides with the linguistic area

2,894

20.0
15.0
10.0
5.0

USA · China · Germany · France · UK · Italy · Spain · India · Turkey · Netherlands

Number of titles produced (2014)

68,854

China · USA · UK · Germany · India · Spain · France · Italy · Turkey · Netherla...
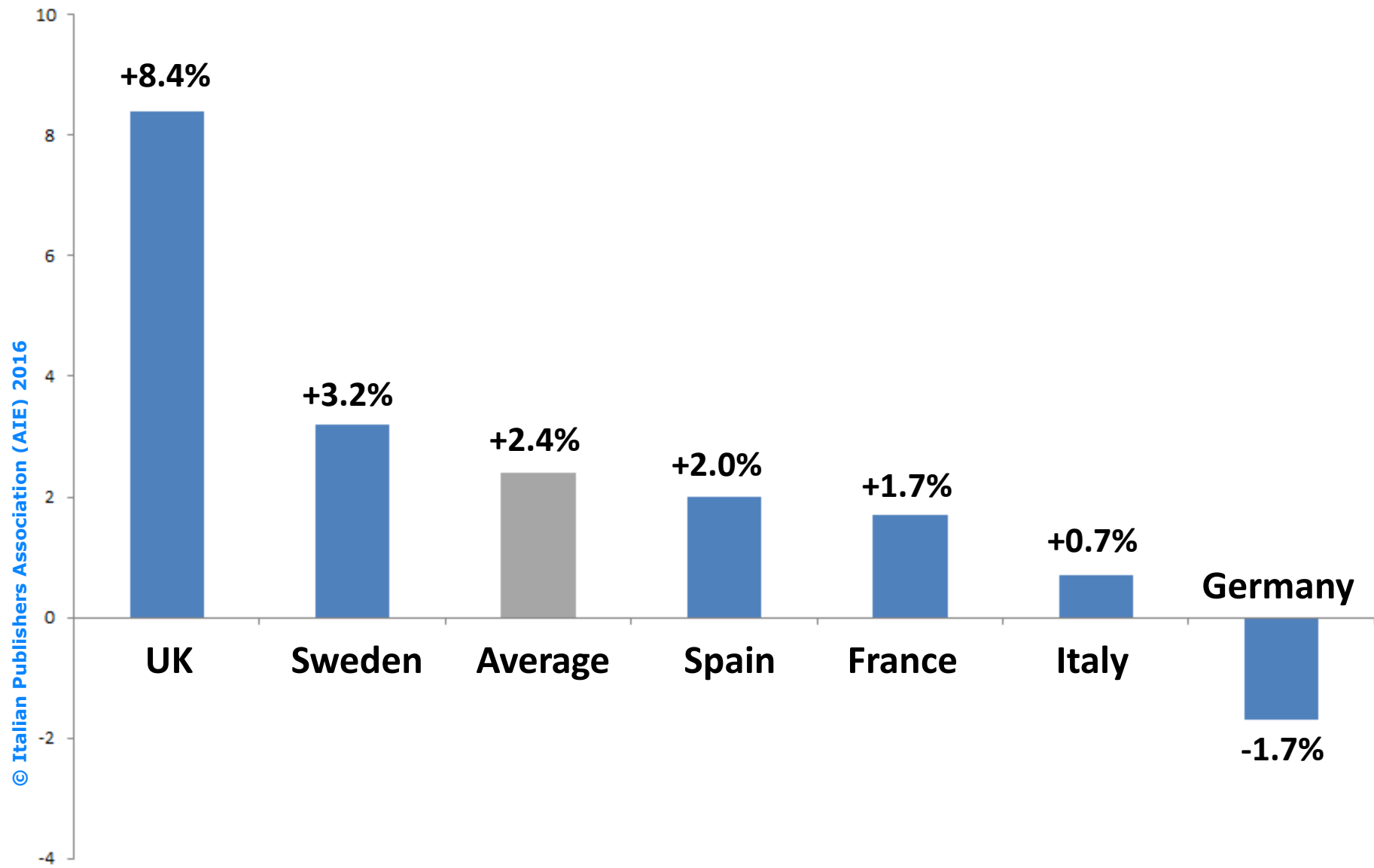
© Italian Publishers Association (AIE) 2016

ediSer

The export sales are excluded from turnover figures

Source: Elaboration by AIE research dept. on The Global eBook Report and FEP Country Report 2014.

AIE

European book market trends 2014-2015

© Italian Publishers Association (AIE) 2016

+8.4%						
UK	**+3.2%**	**+2.4%**	**+2.0%**	**+1.7%**	**+0.7%**	**Germany**
	Sweden	Average	Spain	France	Italy	**-1.7%**

Source: Elaboration by AIE research dept.

AIE
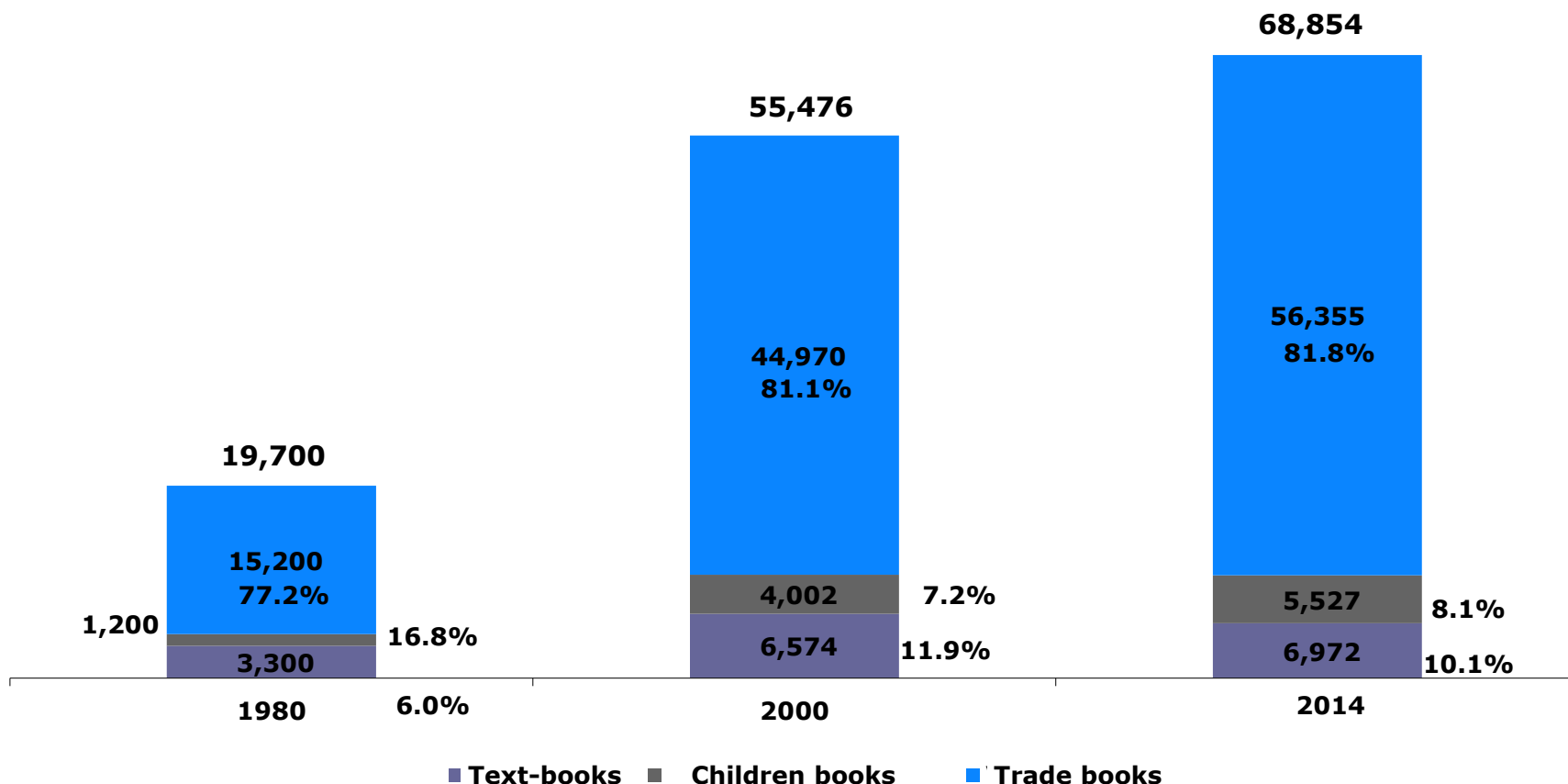
Long term trend in the books published and traded

Every year **181 million copies** are printed

68,800 titles issued per year (net from ebooks and self publishing)
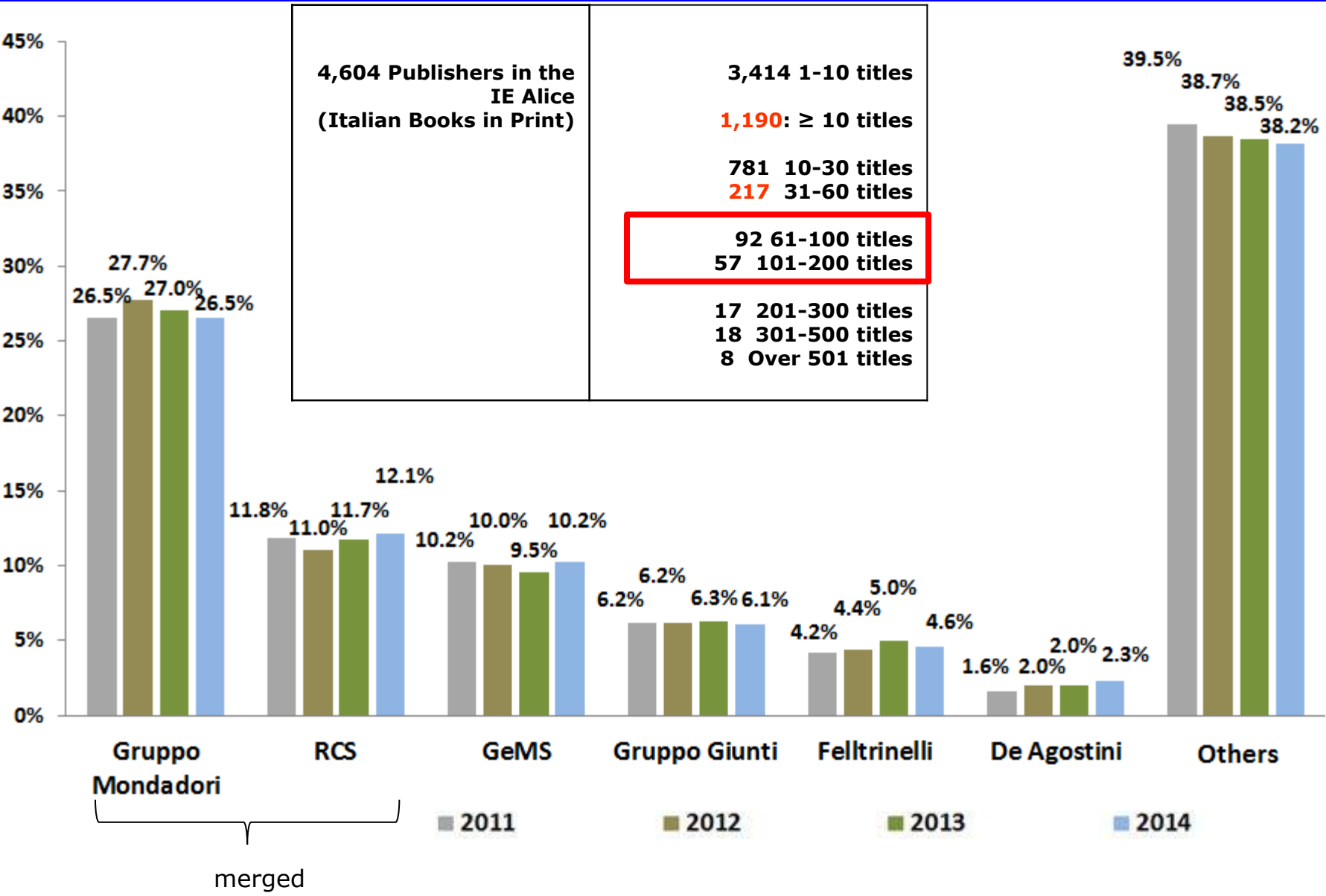
In-print titles are about **861,000** (source: IE)

Very rich variety of books: per genre, authors, prices…

Legend: ■ Text-books   ■ Children books   ■ Trade books

ediSer

AIE

Map of Italian publishing houses 2015

Source: Elaboration by AIE research dept

6 big groups and a number of very active small and medium sized publishers

4,604 Publishers in the IE Alice (Italian Books in Print)

3,414 1-10 titles

1,190: ≥ **10 titles**

781 10-30 titles
217 31-60 titles

92 61-100 titles
57 101-200 titles

17 201-300 titles
18 301-500 titles
8 Over 501 titles

Gruppo Mondadori
26.5% 27.7% 27.0% 26.5%

RCS
11.8% 11.0% 11.7% 12.1%

GeMS
10.2% 10.0% 9.5% 10.2%

Gruppo Giunti
6.2% 6.2% 6.3% 6.1%

Felltrinelli
4.2% 4.4% 5.0% 4.6%

De Agostini
1.6% 2.0% 2.0% 2.3%

Others
39.5% 38.7% 38.5% 38.2%

merged

■ 2011   ■ 2012   ■ 2013   ■ 2014

ediSer

AIE

The competitive arena...

- **Six major players (the first 4 are in the list of 60 biggest publishers in the world)**

MONDADORI	RCS MEDIAGROUP	CeMS	De AGOSTINI	la Feltrinelli	GIUNTI
Big media group, involved in all market segments, leader in trade, one of the largest in school book, owns a large bookshop chain and the second Internet bookshop	Similar approach, but without the vertical integration with bookshop chain	Focus on trade, expanding in scholarly (HSS), linked to Messaggerie, the largest Italian book distributor and wholesaler + the largest Internet bookshop and a book chain	International approach; strong in collectible and other newsstand production; among the leaders in school books; important in academic publishing	Focus on trade; owns the largest bookshop chain and an Internet shop	Strong in trade books and illustrated Present in text book

merged

Other medium size companies are important in particular segments
- In textbooks Mondadori, RCS and De Agostini also compete with Zanichelli, Pearson education and a number of small and medium publishers
- In the academic and professional segment the large groups are less relevant:
    - Presence of foreign companies: Wolter Kluwer Italia is the leader in legal publishing; Pearson, McGraw Hill and Springer have important branches in the country
    - Il Mulino, Il Sole 24 Ore, Franco Angeli, Giuffrè, Carocci, and many others
    - Increasing presence of University press

With a significant presence in Europe...

Netherlands
Rcs International Books;

Germany
De Agostini Deutschland GmbH; St. Paulus

Poland
De Agostini Polska Spzoo; Swiety Pavel Edra

UK
De Agostini UK; St Pauls; E/o

Russia
De Agostini Llc Russia; Giunti O.S. Russia

Portugal
Gruppo Rcs (A esfera dos livros); Paulus

Ukraine
De Agostini Ucraina; Giunti O.S. Ucraina

Serbia
Giunti-Evro Belgrado

Hungary
Giunti O.S. Hungary Kft

Spain
Duomo Ediciones GeMS; San Pablo; Gruppo Rcs (La esfera de los livros); DEA Editorial Planeta (Ediciones Deusto); Feltrinelli Anagrama (10%), Libreria La Central (27,5%)

Bulgaria
Giunti O.S. Bulgaria

Greece
Mondadori Attica Publications (41,7%; Bulgaria, Serbia, Ungheria); De Agostini Hellas

France
Editions Mondadori-France; Giunti–Eurotest Editions; DEA Editions Atlas France; Edition Skira Paris, Médiaspaul; ELI

Switzerland
Editions D'Albert Skira; DEA: Editions Atlas Suisse, Edito Service, Ticino Edizioni;

Turkey
Giunti O.S. DBE

500 km

ediSer

AIE

... and in the world

Mexico
San Pablo; Planeta De Agostini

Canada
Médiaspaul

United States
Gruppo Rcs: Rizzoli International (Rizzoli New York, Universe); DeAgostini Publishing USA; **Skira Rizzoli Publications New York, Edizioni e/o Europa Editions**; St. Pauls; **Edi-Ermes US**

Colombia
Planeta De Agostini; San Pablo

Venezuela
San Pablo; Planeta De Agostini

Equador
San Pablo; Planeta De Agostini

Brasil
Planeta De Agostini; Paulus

Perù
San Pablo; Planeta De Agostini

... rest of the world

De Agostini	Giappone
San Paolo	Australia, Giappone, Corea, Filippine, India, Niger, Zaire

Chile
San Pablo; Planeta De Agostini

Uruguay
Planeta De Agostini

Argentina
San Pablo; Planeta De Agostini

Atlantyca Entertainment (Cina, USA) vendita di diritti

Trends in books reading: 2011-2015

Values in number of readers and in %

26.219 Ml
(+2.0%)

25.708 Ml
(-2.8%)

46.1%

45.3%

24.616 Ml
(-6.1%)

43.1%

24.180 Ml
(+1.7%)

23.768 Ml
(-3.4%)

42.0%

41.5%

2011   2012   2013   2014   2015

Source: Elaboration by AIE research dept based on Istat data

ediSer
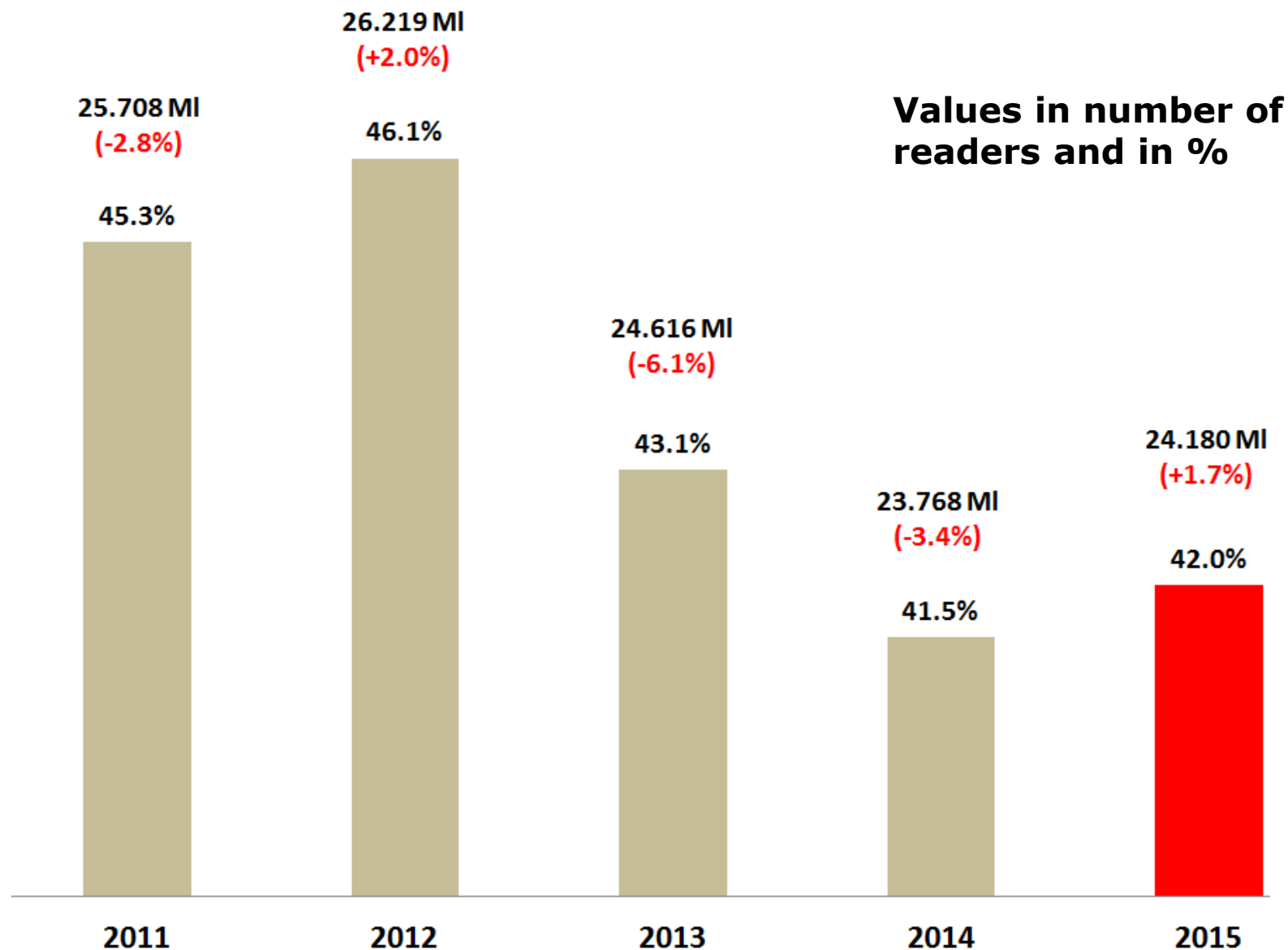
Trends in e-books reading: 2013-2015

% of the population +6

9.5%	8.7%	8.2%

% of Internet users (last 3 months)

18.2%	16.2%	14.1%

2013	2014	2015
4,921,000	4,964,000 (+0.9%)	4,687,000 (-5.6%)

ediSer

Source: Elaboration by AIE research dept based on Nielsen data for Cepell and Istat

AIE

Market trend: 2012 -2014

3,117.1

-5.1%

2,957.2

223 Ml euro decrease (-7.1%)

-2.2%

2,893.5

Trade channels: bookstores, mass distributors, online stores

1,321.0

1,258.2

1,223.0

Other trade

52.3

51.6

52.5

2,526.1 Ml euro

Educational

654.9

620.0

589.0

Digital: e-books, databases, Web services

185.8

200.6

238.6

Instalments, collectibles (newsstands), etc.

520.2

404.0

345.0

b2b, export

120.4

111.0

78.0

used, non-books

262.5

311.8

367.4

2012

2013

2014

Bundled products (books)

60.9

53.6

42.9

Source: Elaboration by AIE research dept

Market shares of trade channels (excluding e-books): 2010-2015

	2010	2011	2012	2013	2014	2015
Online stores	5.1%	8.9%	11.0%	12.0%	13.7%	13.9%
Family-run bookstores	38.8%	35.0%	32.0%	31.0%	30.7%	31.0%
Chain bookstores including franchising	39.8%	40.0%	40.7%	41.7%	40.7%	41.2%
Hyper-market and megastore	16.3%	16.1%	16.3%	15.3%	14.9%	13.9%

amazon.it

ediSer

Source: Elaboration by AIE research dept on Nielsen data

AIE
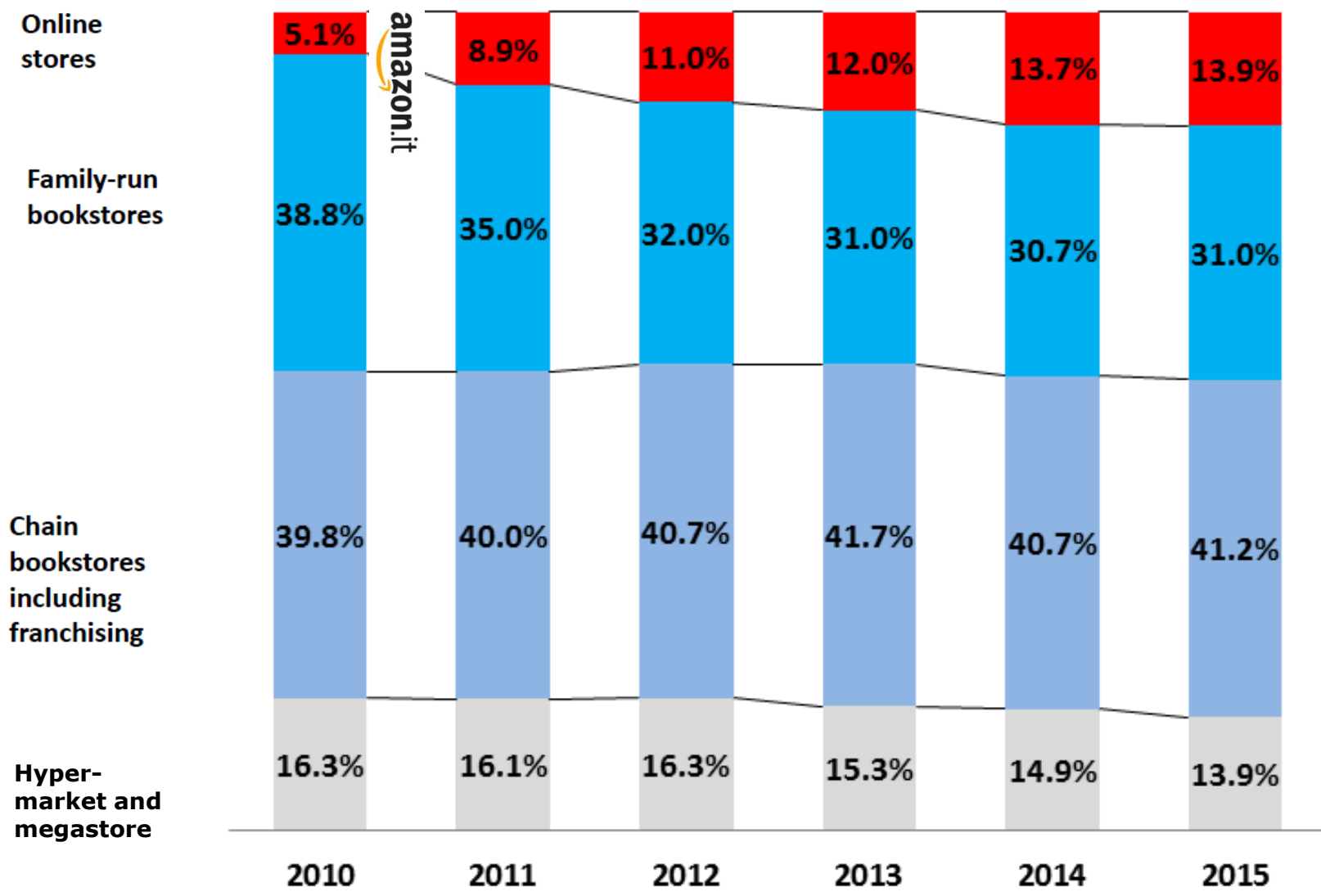
The bookshops

	2006		2010		2013		2014	
	N°	%	N°	%	N°	%	N°	%
Bookshop chains	583	30.4	717	37.7	940	48.0	927	49.0
Indipendent chains	45	2.4	69	3.6	84	4.3	78	4.1
Indipendent bookshops	1,290	67.2	1,115	58.7	936	47.8	887	46.9
Total	1,918	100	1,901	100	1,960	100	1,892	100

Source: 2006-2010 elaboration on Siscom data; 2013-2014 elaboration by AIE research dept

.coop Ambasciatori (Bologna)

Feltrinelli Duomo (Milano)

Some figures of «Più libri più liberi» Book Fair

	2002	2005	2010	2011	2012	2013	2014	2015
Open days	4	4	5	5	4	4	5	5
Visitors	30,259	41,395	56,923	56,000	51,024	53,383	55,540	53,360
professional	1,531	5,955	6,933	6,370	6,677	6,824	5,099	3,777
Exhibitors	262	358	431	430	415	380	382	378
Stands	168	262	296	293	293	295	291	293
Events	85	205	335	300	280	310	331	326
Copies sold	40,000	51,000	87,000	85,000	80,000	80,000	78,000	80,000

Più libri

Tutte le forme della scrittura

ediSer

AIE

The e-book market

Market trend

	2011	2012	2013	2014
E-book M€	12.6	23.8	32.1	40.5
Δ%		+88.9%	+34.9%	+26.1%
Trade channels[1] M€	1,489.7	1,373.3	1,238.2	1,191.6
Δ%		-7.8%	-6.1%	-3.8%
e-book/trade %	0.8%	1.7%	2.8%	3.4%

[1] Nielsen includes in this definition bookstores, mass distribution and online stores

Source: Elaboration by AIE research dept

Estimate of downloaded copies[1] of e-books:2012-2014

Values in number of purchasers and in %

+29.4%

8,150,000

6,300,000

+90.1%

3,300,000

2012   2013   2014
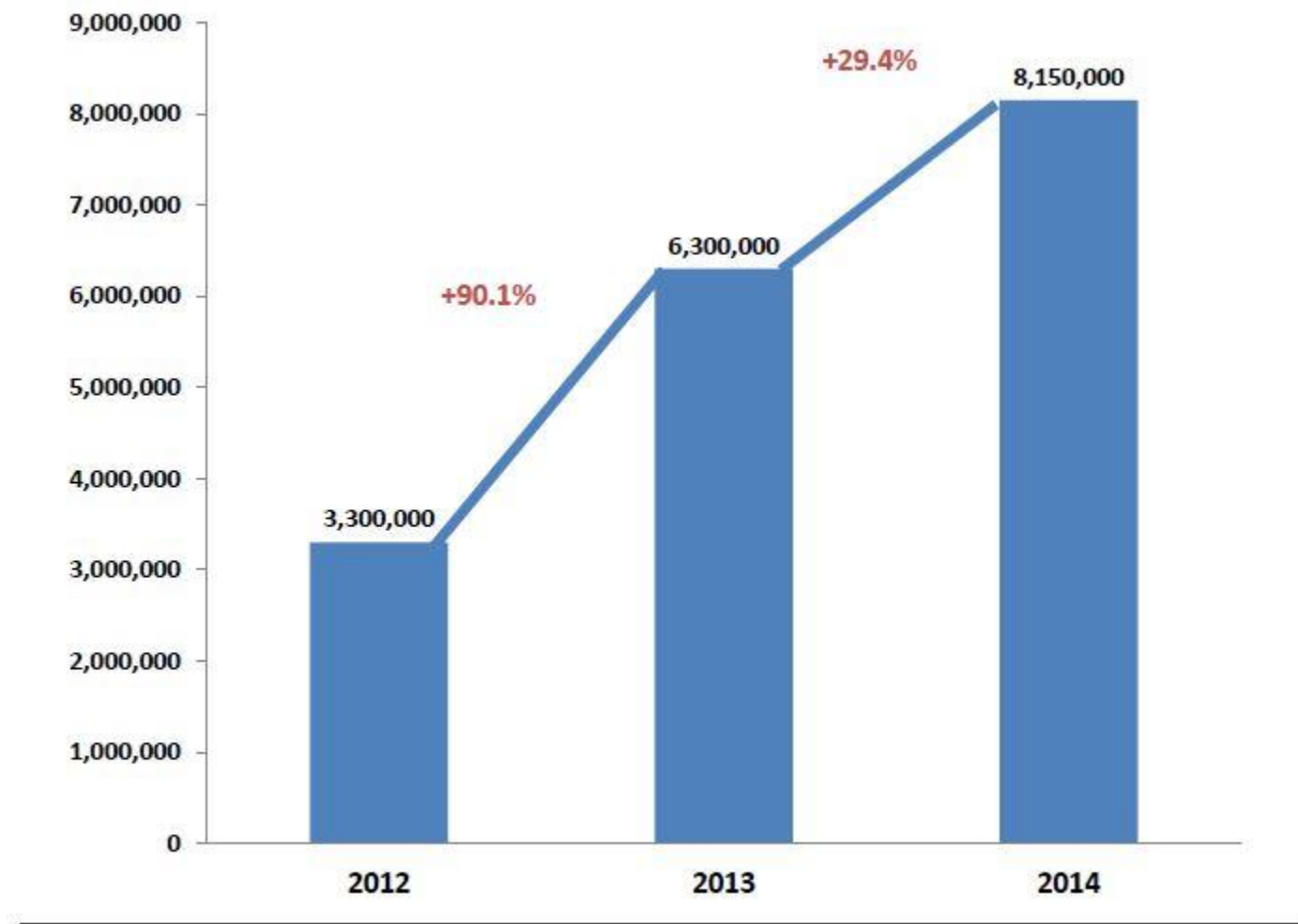
[1] They (probably) include free and illegal copies.

ediSer

Source: Processing of Assinform – NetCom data by the Italian Publishers Association Research Department

AIE

Translation rights

Trends in translation rights exchange

Traditionally, Italian publishing is very sensitive to what is published in other countries: 19-20% of Italian titles are translations (and in the 90s this percentage reached 24-25%). The Italian reader is very interested to foreign literature and culture. In the last decade, the capacity of Italian publishers to sell rights abroad grew dramatically: leading areas are **children books, fiction, art, design, religion**.

Rights purchases

+18.6%

10,685

10,474

+2.0%

9,009
9,874
9,213
8,997
9,104

Right sales

+40.9%

5,296
5,914

4,629
4,284
4,597
+11.7%

4,217
4,914

2010 2011 2012 2013 2014 2015
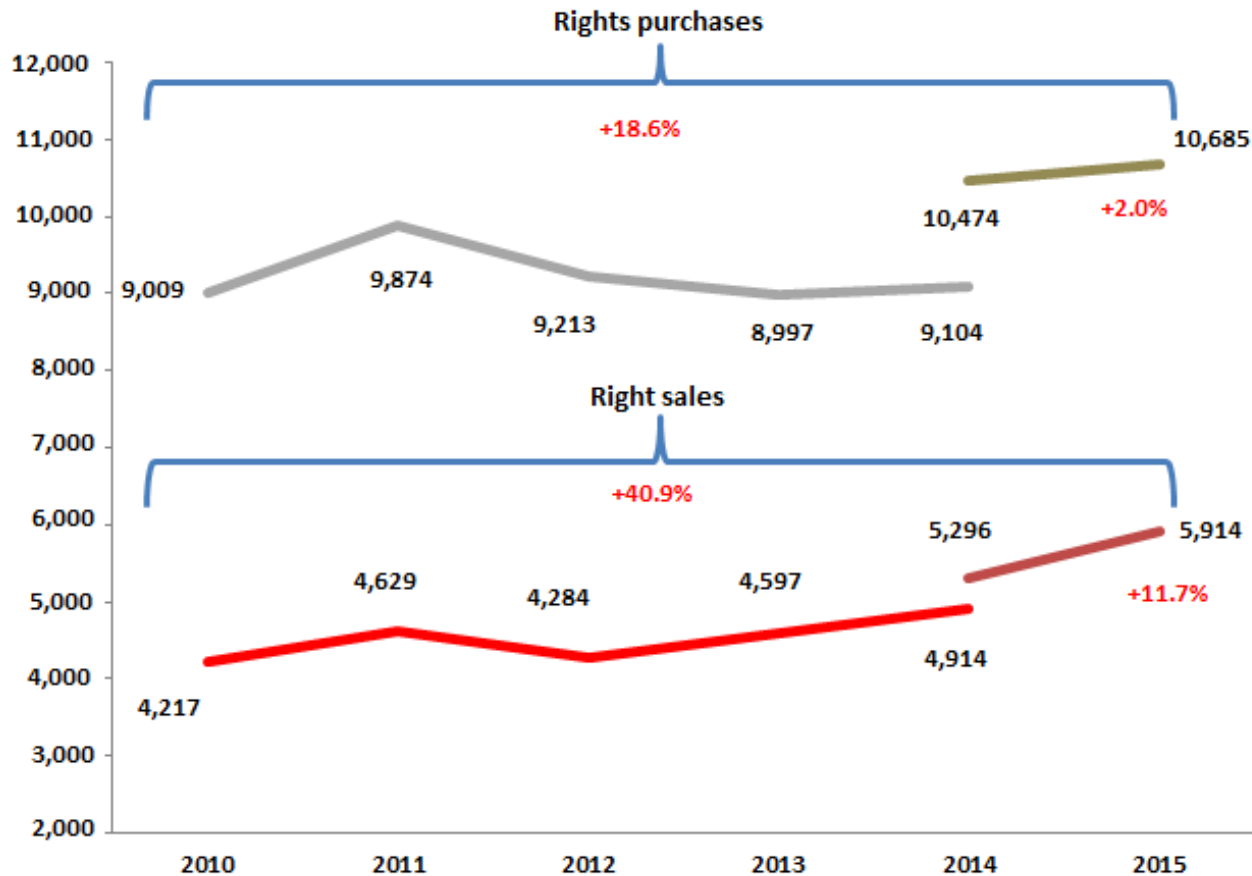
Source: Elaboration by AIE research dept on declarations of publishers

ediSer

AIE

National Translation Award
Body: Ministero per i Beni e le Attività Culturali Direzione Generale per le Biblioteche, gli Istituti Culturali ed il Diritto d'Autore
www.librari.beniculturali.it
Frequency: Annual
Deadline: February of each year

Awards & Grants for the Promotion of Books and Translated Works
Body: Ministero degli Affari Esteri Direzione Generale per la Promozione e Cooperazione Culturale
www.esteri.it
Frequency: Annual
Deadline: March 31st, September 30th of each year

Translation Grants
Body: SEPS – Segretariato Europeo per le Pubblicazioni Scientifiche
www.seps.it
Deadline: on-going

ediSer

AIE

BooksinItaly

The platform present the best of Italian publishing production of the present and the past and facilitate its translation.
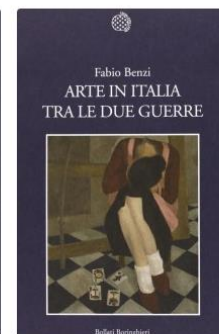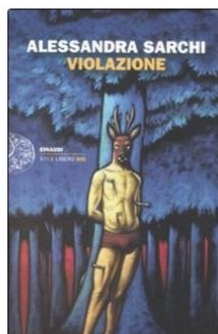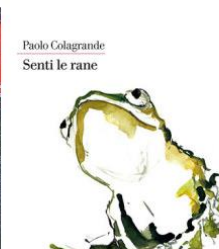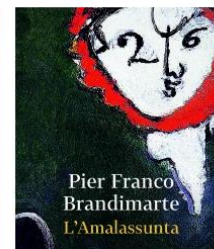
Realized by:

Fondazione Arnoldo e Alberto **Mondadori**

In collaboration with:

Italy from net buyer to net seller of rights: The case of children books

Trend in translation rights exchange in children books

10 years ago we were buying more than the double than we were selling. In 2011 we sell 50% more titles than we buy.

The importance of the international cooperation in this field is even more important when considering also co-editions.

Rights sales — **Rights purchases**

Data points:

Rights sales (red): 486 (2001), 680 (2002), 738 (2003), 528 (2004), 468 (2005), 766 (2006), 1.004 (2007), 1.353 (2008), 1.488 (2009), 1.607 (2010), 1.872 (2011), 1.984 (2012), 2.029 (2013), 2.167 (2014) +6,8%

Rights purchases (blue): 1.250 (2001), 1.100 (2002), 1.210 (2003), 1.239 (2004), 1.369 (2005), 1.321 (2006), 1.384 (2007), 1.439 (2008), 1.365 (2009), 1.283 (2010), 1.170 (2011), 963 (2012), 879 (2013), 840 (2014) −4,4%

+12,6% (media annua)   +5,2% (media annua)

ediSer

Source: ICE-Doxa 2001-2007; Aie 2008-2014

AIE

Reasons for this performance

The survey points out very clearly the importance of children books in Italian export of translation rights:

- 30% of the exported titles are children books!

- Other fields where export is significantly more important than import are "Illustrated books" and "Religious books"

The role of the Children Book Fair Bologna is probably crucial, since it allows also small companies to be active in export:

- And creates a favourable cultural milieu within the industry

- Children books are now often conceived as addressed to an international audience since the very first steps

Children book publishing in Italy dramatically grew in the 90s:

- From 1990 to 2000 number of new titles published grew by 62%, number of printed copies by 75%.

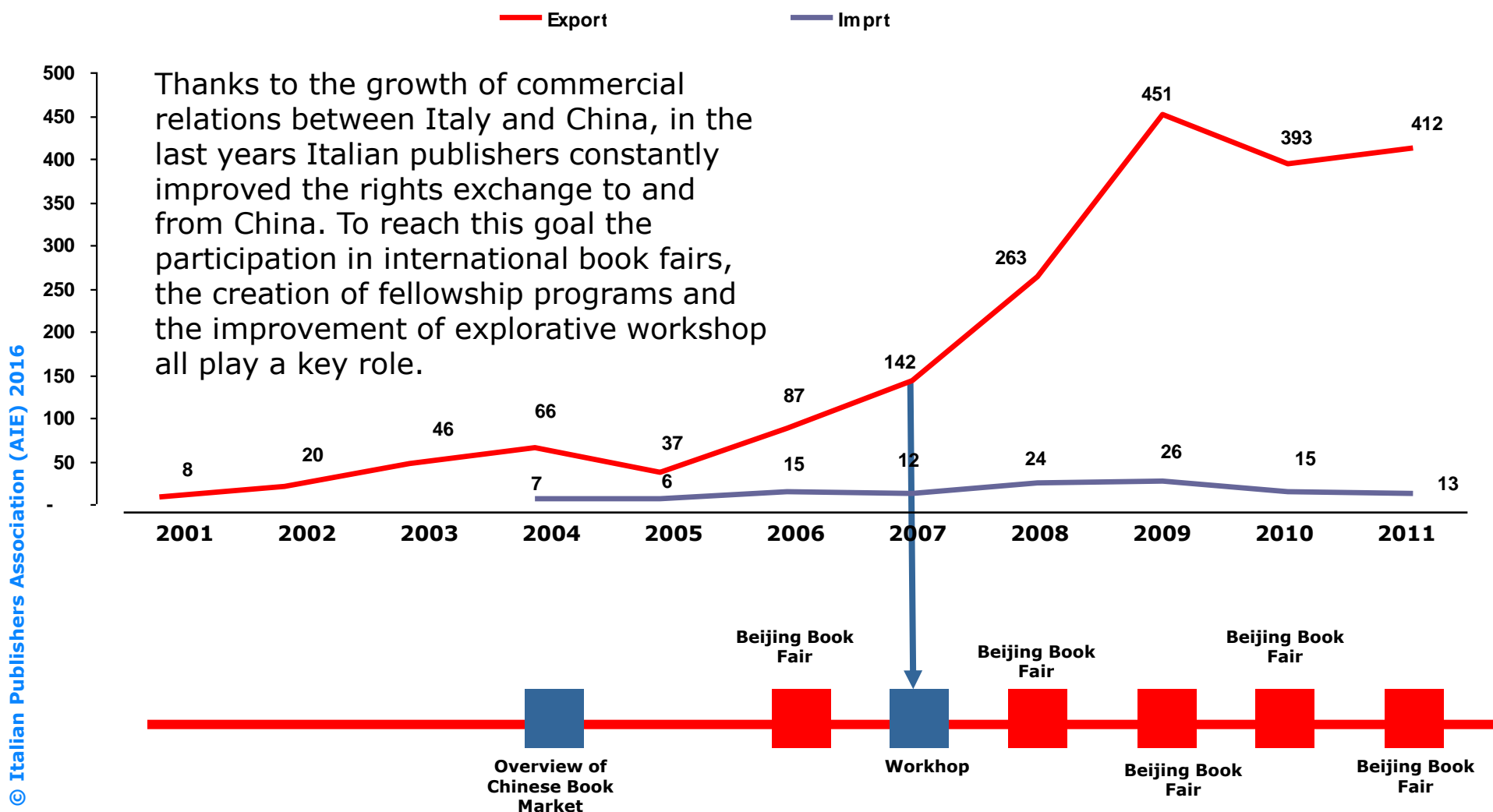- This created the prerequisite for the growth of export in the following decade

An important tradition of authorship

- From Collodi (*Pinocchio*) and De Amicis to Geronimo Stilton!

Import/Export in China: the relevance of networking

The improvement of the import-export trade of rights is directly connected with the development of mutual long term relationships.

Thanks to the growth of commercial relations between Italy and China, in the last years Italian publishers constantly improved the rights exchange to and from China. To reach this goal the participation in international book fairs, the creation of fellowship programs and the improvement of explorative workshop all play a key role.

— Export ▬ Imprt

Export values: 2001: 8, 2002: 20, 2003: 46, 2004: 66, 2005: 37, 2006: 87, 2007: 142, 2008: 263, 2009: 451, 2010: 393, 2011: 412

Import values: 2004: 7, 2005: 6, 2006: 15, 2007: 12, 2008: 24, 2009: 26, 2010: 15, 2011: 13

Timeline events:
- Overview of Chinese Book Market
- Beijing Book Fair
- Workhop
- Beijing Book Fair
- Beijing Book Fair
- Beijing Book Fair
- Beijing Book Fair

© Italian Publishers Association (AIE) 2016

ediSer

AIE

Innovation in digital services

LIA started as a project funded by the Italian Ministry of Culture and carried out by AIE in collaboration with the Italian Blind Union.

In May 2014 the **LIA Foundation** was created to promote inclusion and accessibilty.

The objective of the LIA Foundation is the promotion of a cultural change in the way accessibility is addressed all along the value chain: a **mainstream accessible digital reading experience** needs the efforts of all the actors and players involved, each for its part.

It offers over **11,000 accessible e-books**, produced by **68** publishers (which represent about 80% of the Italian publishing market).
400 new books a month are added.
The LIA service is based on three key elements:

- The **use of standards** for production (EPUB) and book data communication (ONIX for Books);
- A production model that, at full capacity, allows publishers to **produce accessible titles since their first edition**;
- A book data communication and distribution model able to integrate as much as possible in **the mainstream digital publishing value chain**.

More info: www.fondazionelia.org - www.libriitalianiaccessibili.it

ARROW is a distributed system to streamline "rights information discovery" in a book or collection of books to lawfully digitise and make available the European cultural heritage.

ARROW is up and running in 16 European countries. The Arrow Association, a not-for-profit entity is responsible for the management of the system.

The **European Directive on Orphan Works** lists ARROW has been listed among the appropriate sources to be consulted to perform the diligent search process for rightholders of published works.
Moreover, Arrow suits perfectly any implementation of the Memorandum of Understanding on the digitisation and making available of **out-of-commerce works**.

ARROW has already being used:
- in UK for Wellcome Trust and British Library World War I digitisation programs;
- in France for ReLIRE project, where ARROW is being used by the French National Library following the implementation of the recent law on out of commerce books.

AIE currently chairs the Board of the ARROW Association. mEDRA is a technical provider for the ARROW system.
For more info: www.arrow-net.eu

ediSer

AIE

RDI (Rights Data Integration) is a pilot project started in October 2013 aiming at demonstrating how to efficiently manage and trade intellectual property rights online for any and all types of usage, across any and all types of content, in any and all media.

At the core of RDI is the creation of an interoperable **communication layer between rights data sources and rights users**.

The joint initiative between **mEDRA** and **CLEARedi**, the Italian collective management organisation for publishers, **to facilitate rights transactions for online licensing** Developed in **collaboration with CCC**.

The use case includes:
– the creation of an aggregation platform to manage the mandates given by Italian publishers for licensing their repertoire of textual works and the related data exchanges
– piloting of the LCC Common Rights Format to support rights information exchanges between the parties
– piloting the use of rights-aware DOIs to promote discoverability of the rights related to textual content.

AIE participates through Ediser and mEDRA.

For more info: www.rdi-project.org

TISP (Technology and Innovation for Smart Publishing), started in January 2013, is the European thematic network coordinated by AIE to promote collaboration between publishing companies and ICT industry, in order to stimulate innovation in the two sectors.

The network organises events and seminars addressing the publishing and ICT professionals, and helps publishing and ICT converging on specific business needs and on the strategic view for the future.

In April 2014, the first edition of policy recommendations, giving the publishing and technology sectors a common base at European level to foster and sustain innovation, has been released.

The results of the network activities are published online on the Smart Book, along with studies, interviews, original contribution and relevant business cases that demonstrate how publishing and ICT can build win-to-win partnerships.

AIE coordinates the project and the network. mEDRA is a project partner.

For more info: www.smartbook-tisp.eu

Conclusions

- **Italian publishing is a dynamic industry**

- **Open to the international market, particularly in import/export of rights**

- **A market where small and medium sized publishers play an important role**

  - Not only for cultural reasons
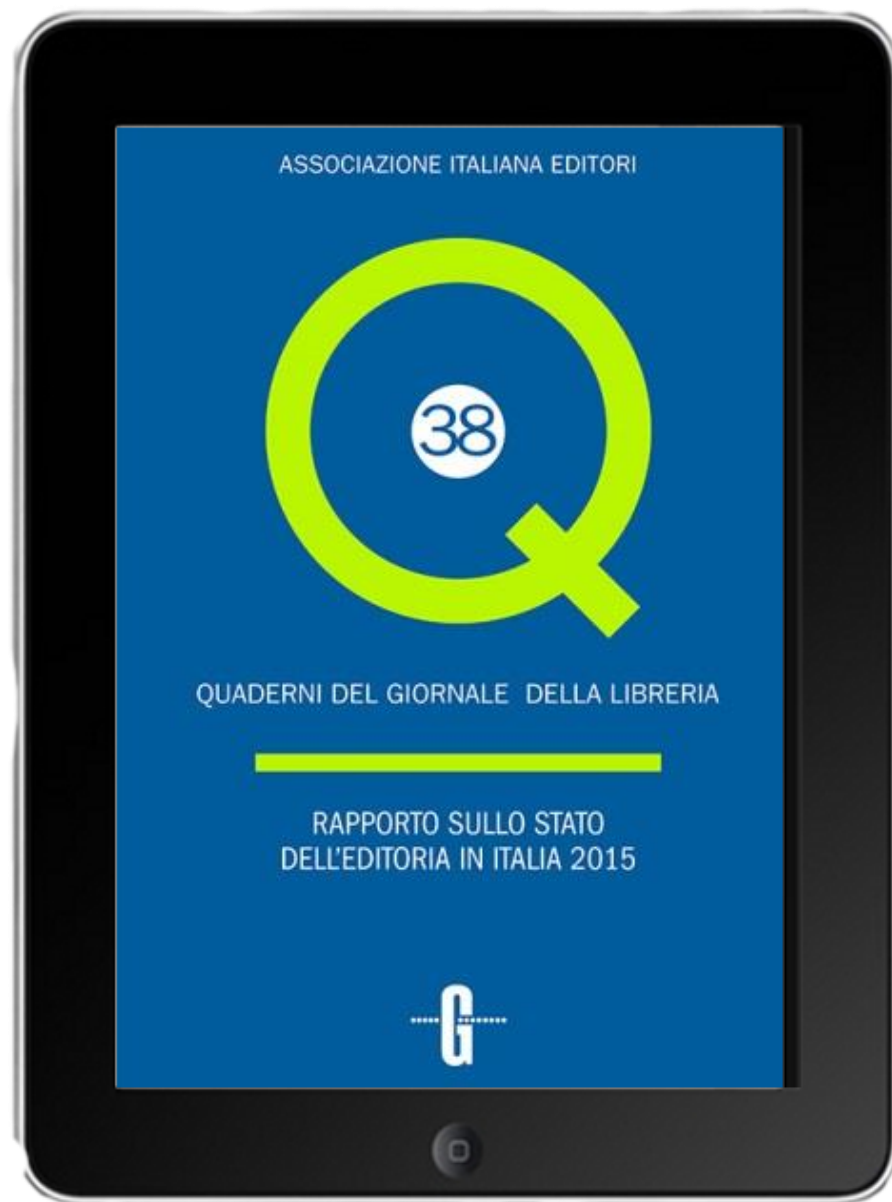
  - Also important from the business viewpoint

Source: Elaboration by AIE research dept

Check out all the data on Italian publishing industry in the

Report on Publishing in Italy 2015

Available in the main on line stores

Info and updates on
www.aie.it