

The long summer of Italian publishing

The market of trade books (fiction and non fiction sold in bookstores and large-scale retail) in Italy in the first nine months of 2021

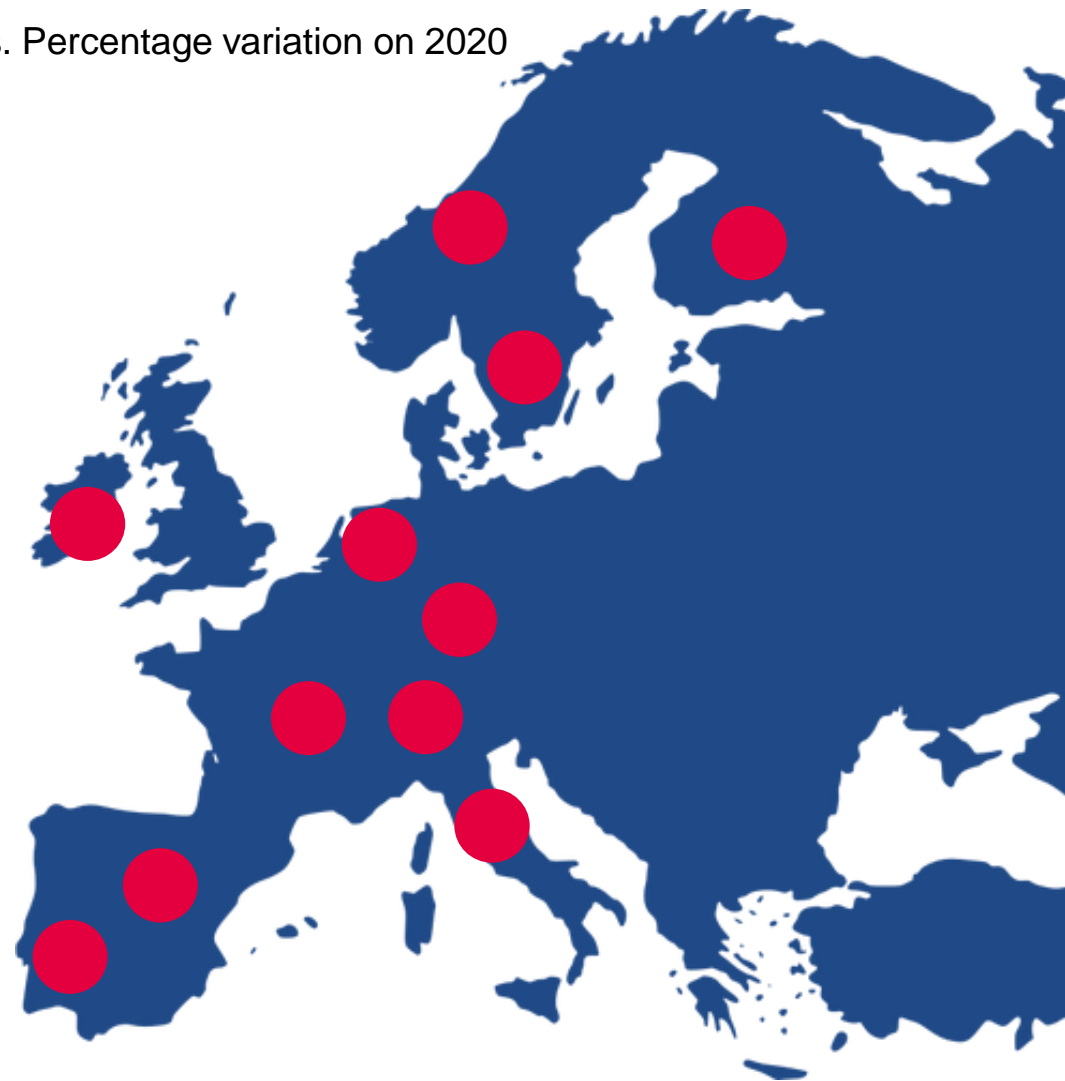
15 October 2021

Turin International Book Fair

How the trade market performed during the first six months of 2021 in some European countries

Trade market by value excluding ebooks and audiobooks. Percentage variation on 2020

France	+43%	Finland	+14%
Spain	+43%	Sweden	+10%
Italy	+42%	Austria	+6%
Ireland	+21%	Germany	+4%
Portugal	+19%	The Netherlands	+4%
Norway	+15%		



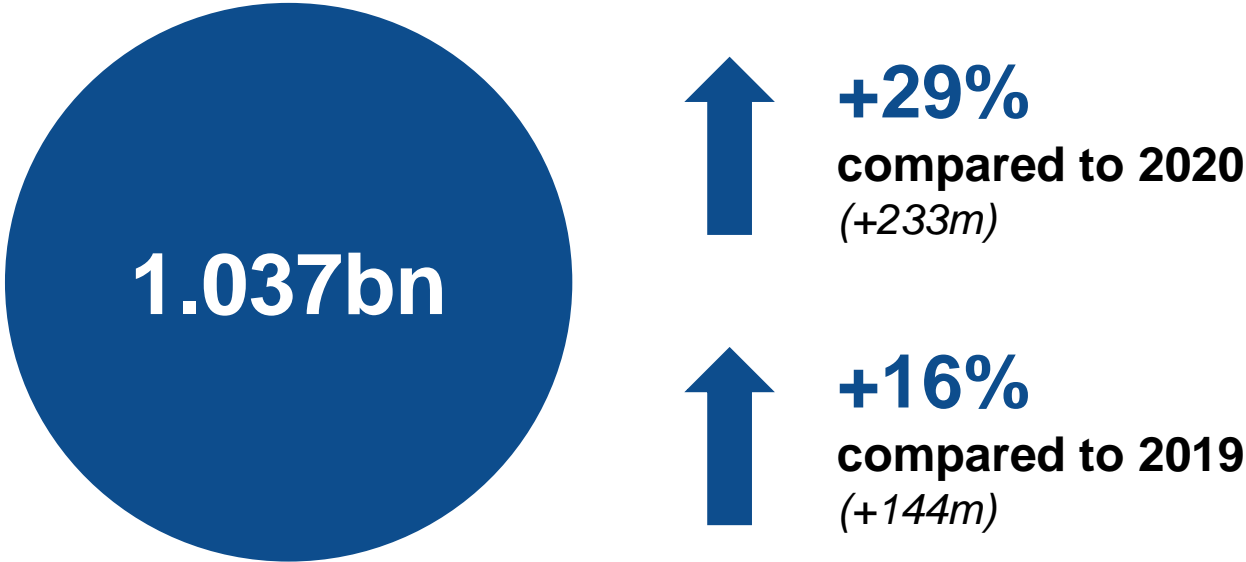
Market performance factors in the different countries:

- Bookstore opening period in 2020 use for comparison with 2021
- Vaccination progress
- Pick up in consumption in 2021 and e-commerce share

Source: AIE (Italian Publishers Association) research department from different sources

And now let's look at the first nine months of the year in Italy. Trade sales by value continue to increase

Value at cover price in millions of euros and percentage variation compared to previous years (4 January-19 September)



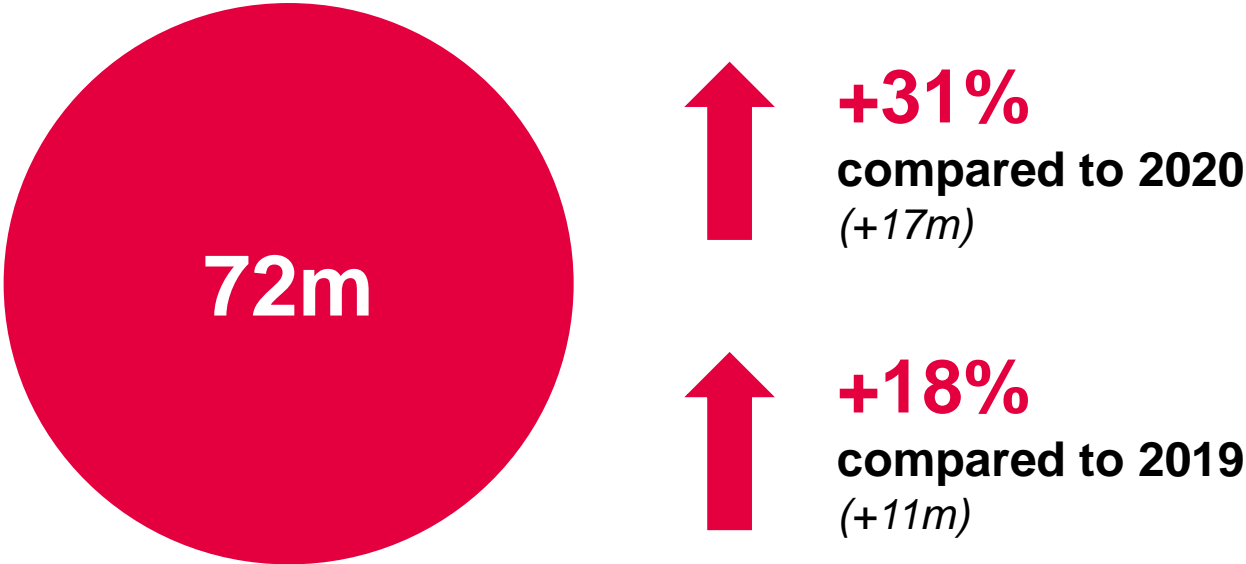
Value of trade market*
in the first nine months of the year

*Sales of printed books in physical bookstores, online and large-scale retail. Not including educational publishing.

Source: AIE [Italian Publishers Association] research department based on NielsenIQ data

The trade market is still growing more by copies than by value

Value in millions of copies sold and percentage variation compared to previous years (4 January-19 September)



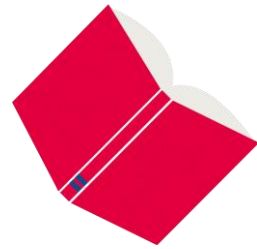
Copies sold on the trade market* in the first nine months of the year

*Sales of printed books in physical bookstores, online and large-scale retail. Not including educational publishing.

Source: AIE [Italian Publishers Association] research department based on NielsenIQ data

Cover price is continuing to decrease

Variation compared to previous years (4 January-19 September)



€14.35

Average price in the first nine months of 2021



-1.9%
compared to 2020
(€14.62)

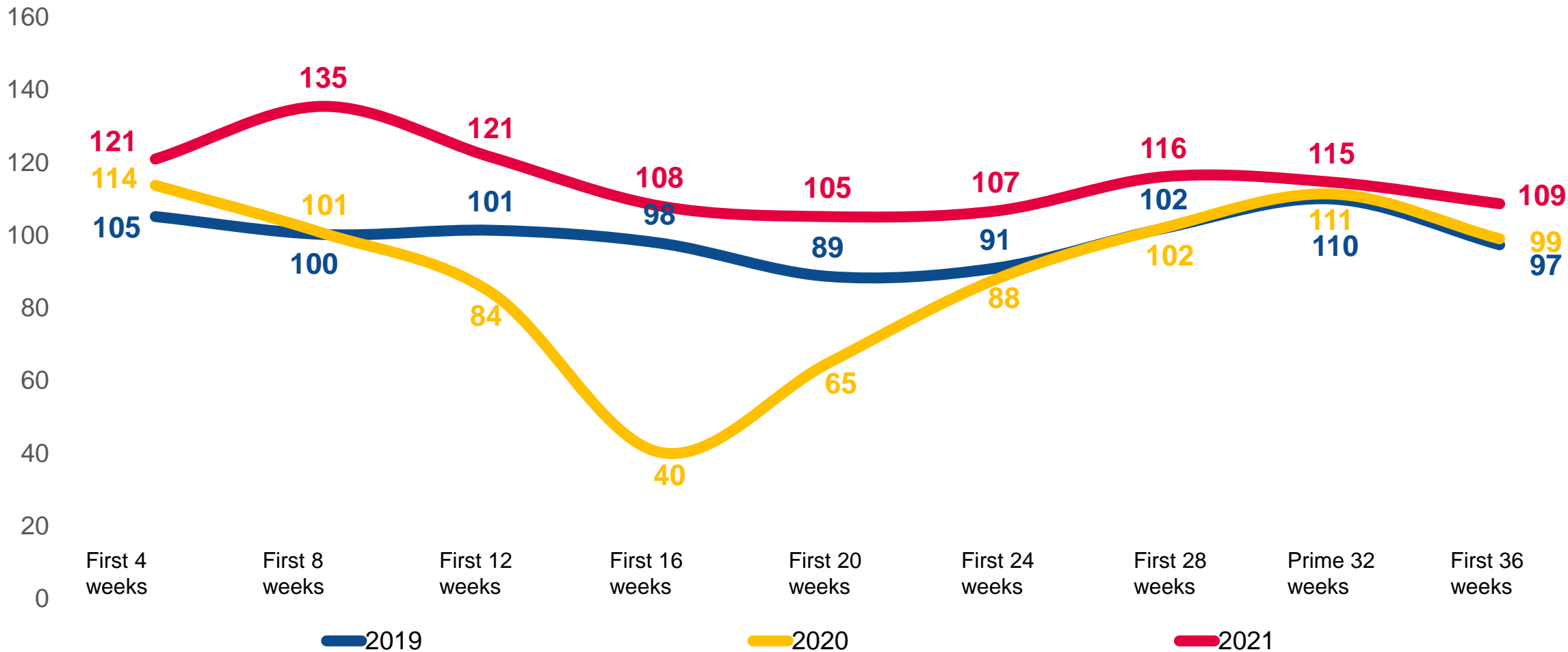


-1.7%
compared to 2019
(€14.,60)

Source: AIE [Italian Publishers Association] research department based on NielsenIQ data

Growth is no longer driven only by sales during the first part of the year

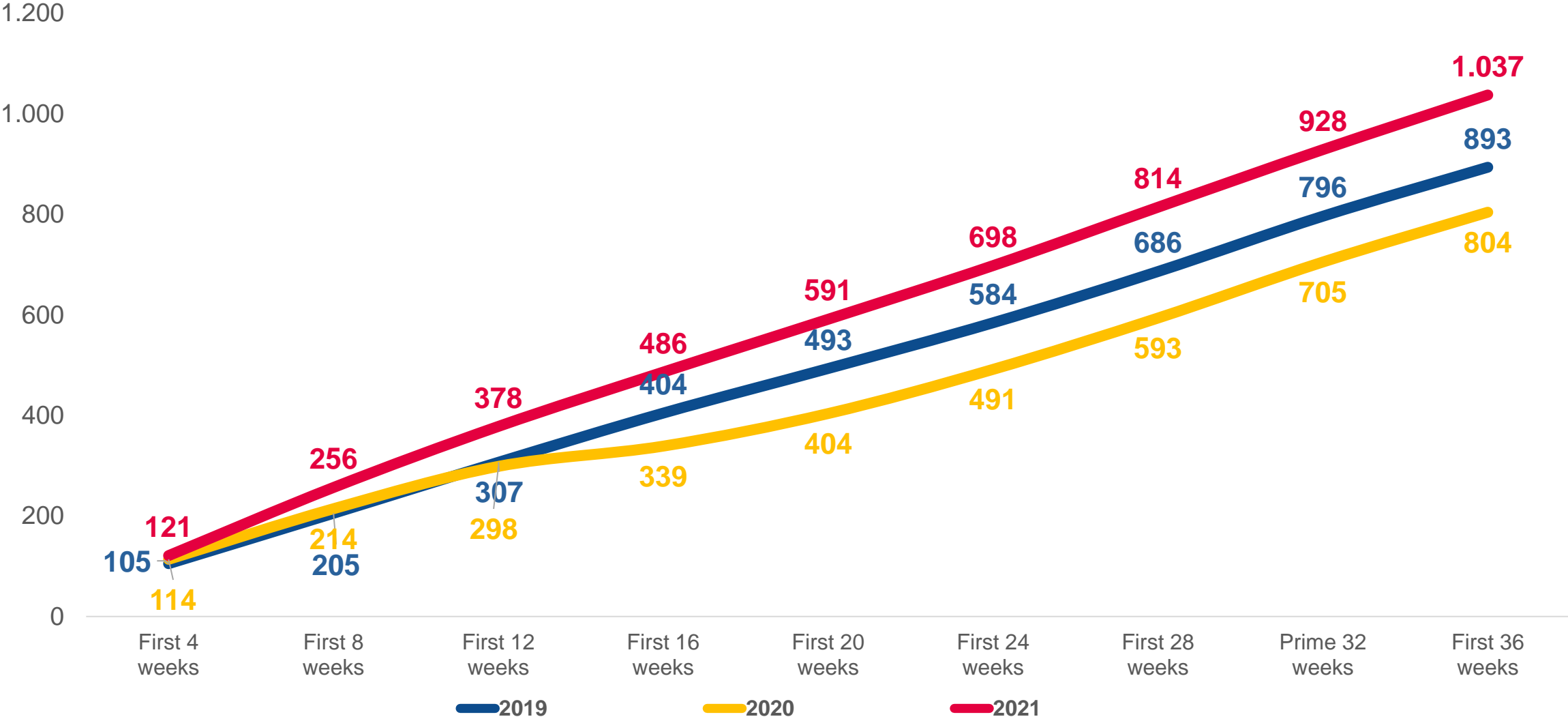
Value of monthly sales at cover price. Value in millions of euros (4 January-19 September)



Source: AIE [Italian Publishers Association] research department based on NielsenIQ data

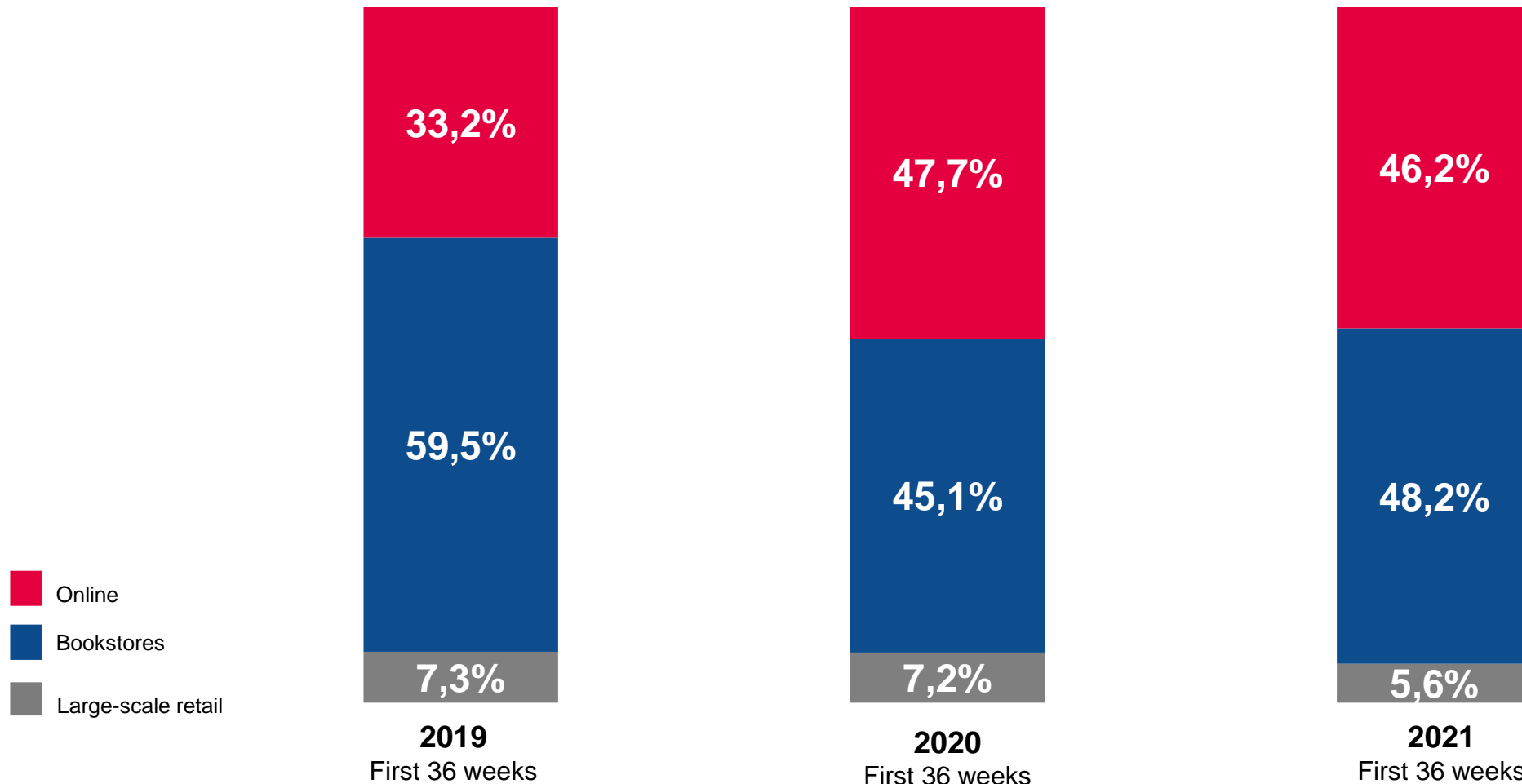
Cumulative sales performance in the first nine months of the year

Cumulative sales performance at cover price in millions of euros (4 January-19 September)



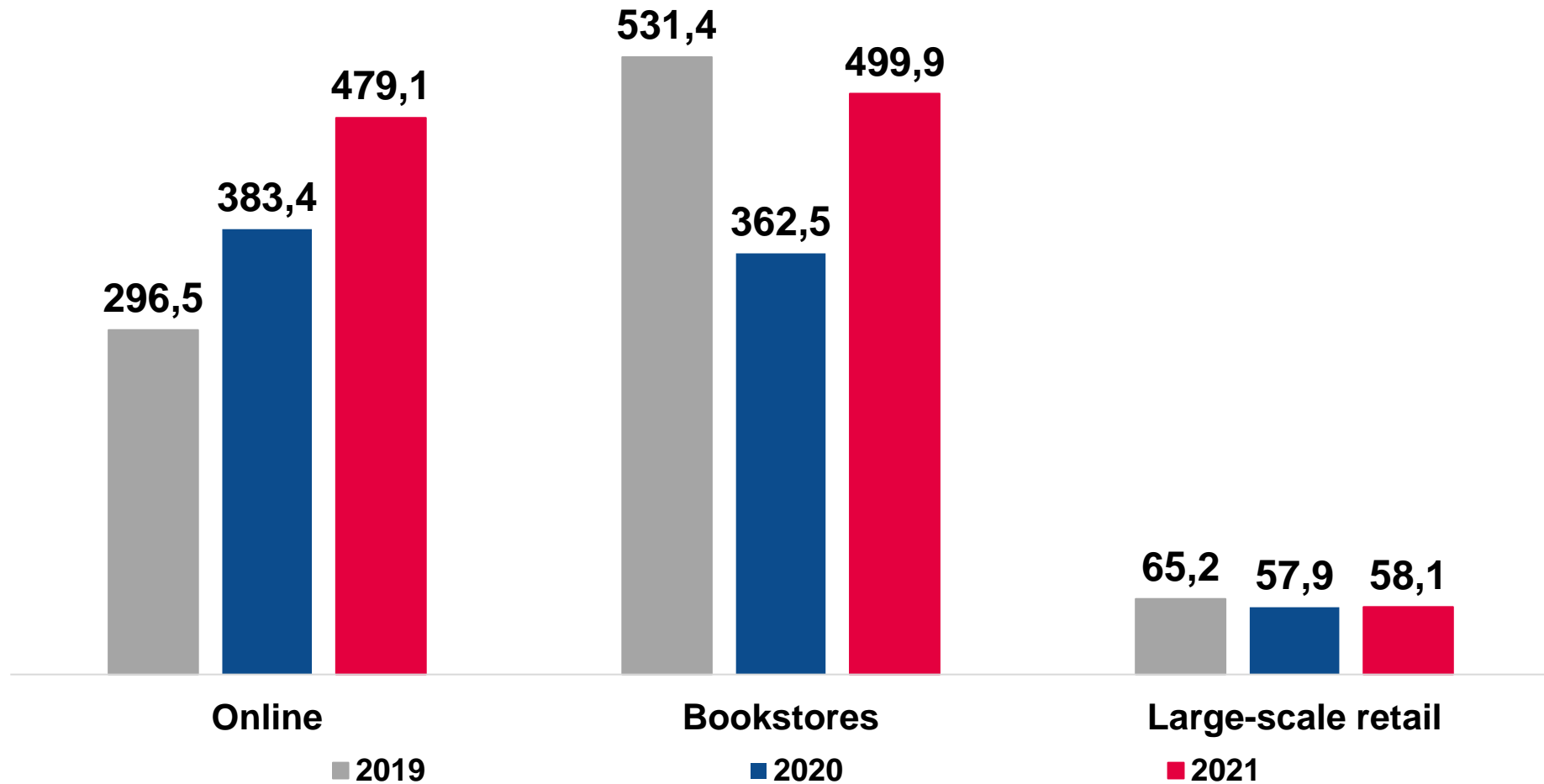
Let's look at market shares. Bookstores once again overtake online sales. But online sales are worth about half. Large-scale retail is still in trouble

Market shares in percentages based on sales at cover price (4 January-19 September)



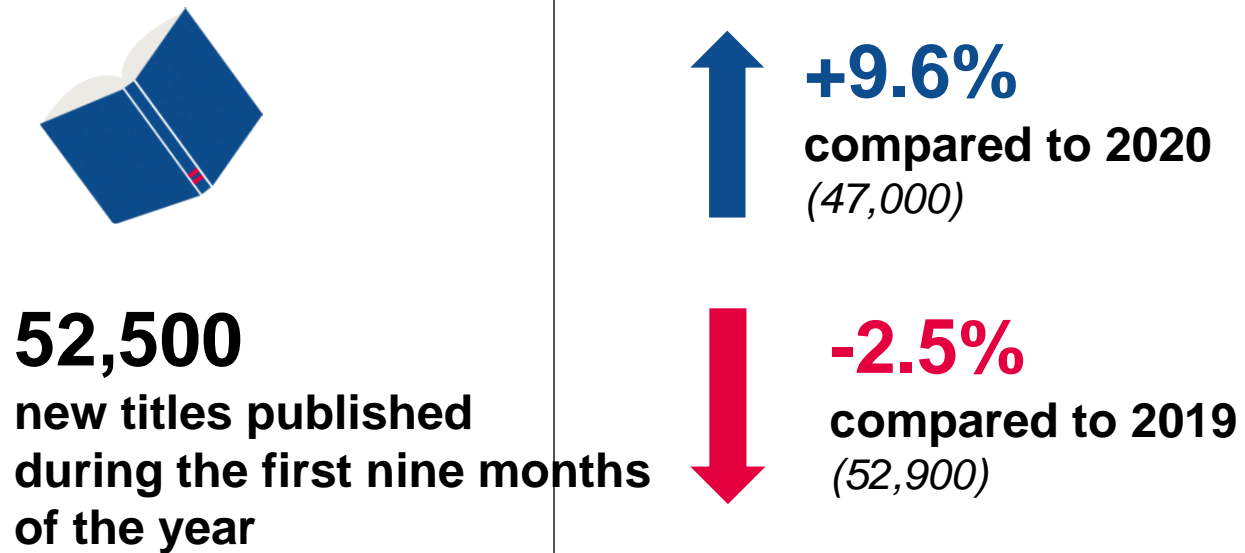
Performance by individual channels: constant growth for online sales but bookstores make up nearly all the ground lost in 2020

Value of sales at cover price in millions of euros (4 January-19 September)



The number of new titles published during the first nine months is increasing, but still without reaching 2019 values

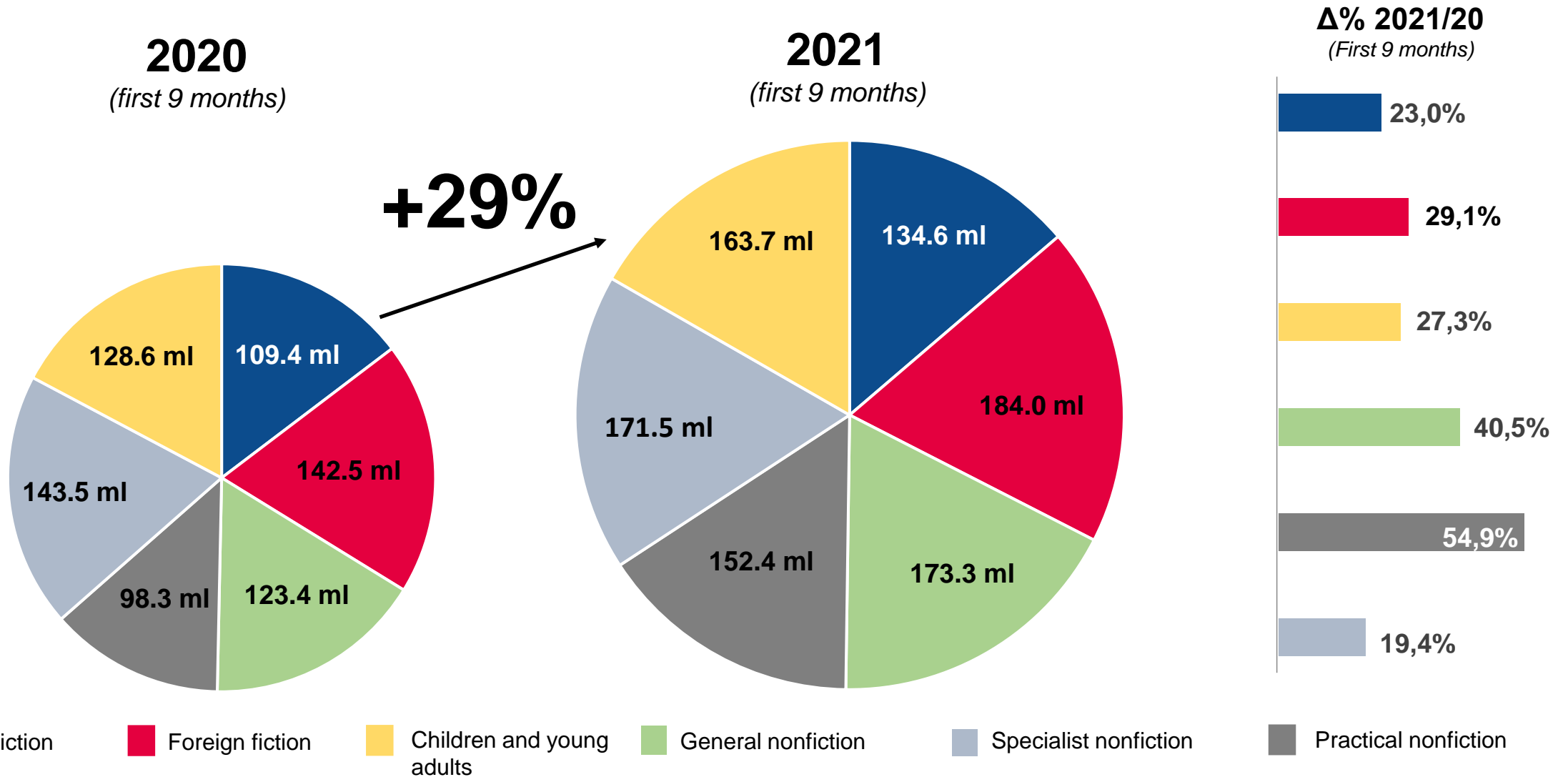
The number of new titles printed published and percentage variations compared to previous years



Source: IE Informazioni Editoriali

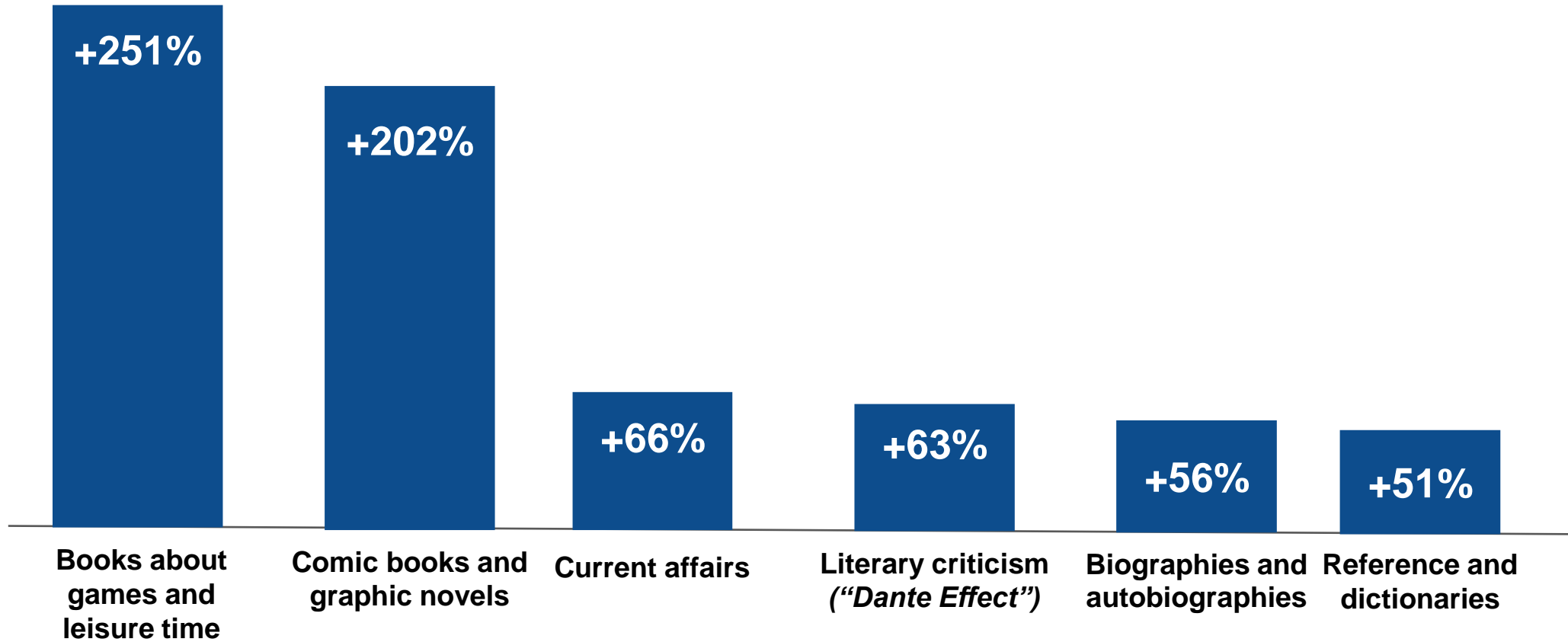
Growth in the trade market applies to all the macro-genres

Market shares by value by genre and total growth in percentages



Trade segments showing most growth

Increases expressed in percentage of the value in the first 9 months of the previous year



Source: AIE [Italian Publishers Association] research department based on NielsenIQ data

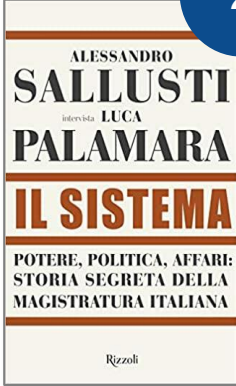
The Top 10 in the first 9 months: a mix of new titles, long-sellers and different narrative genres

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L'inverno dei Leoni, S. Auci, Nord (May 2021)

2



Il sistema, A. Sallusti, L. Palamara, Rizzoli (January 2021)

3



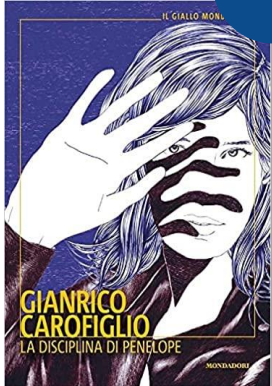
Cambiare l'acqua ai fiori, V. Perrin, E/O (July 2019)

4



La canzone di Achille, M. Miller, Marsilio (January 2019)

5



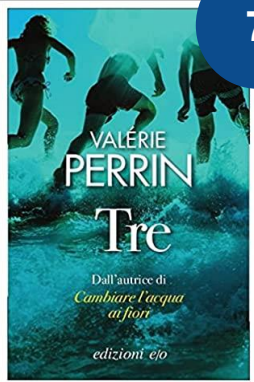
La disciplina di Penelope, G. Carofiglio, Mondadori (January 2021)

6



Le storie del quartiere, G. Lyon, Magazzini Salani (February 2021)

7



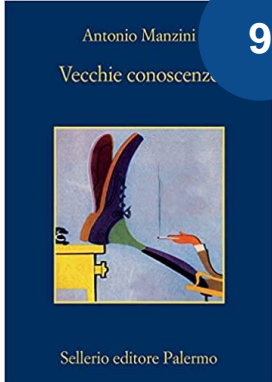
Tre, V. Perrin, E/O (June 2021)

8



Finché il caffè è caldo, T. Kawaguchi, Garzanti (March 2020)

9



Vecchie conoscenze, A. Manzini, Sellerio (June 2021)

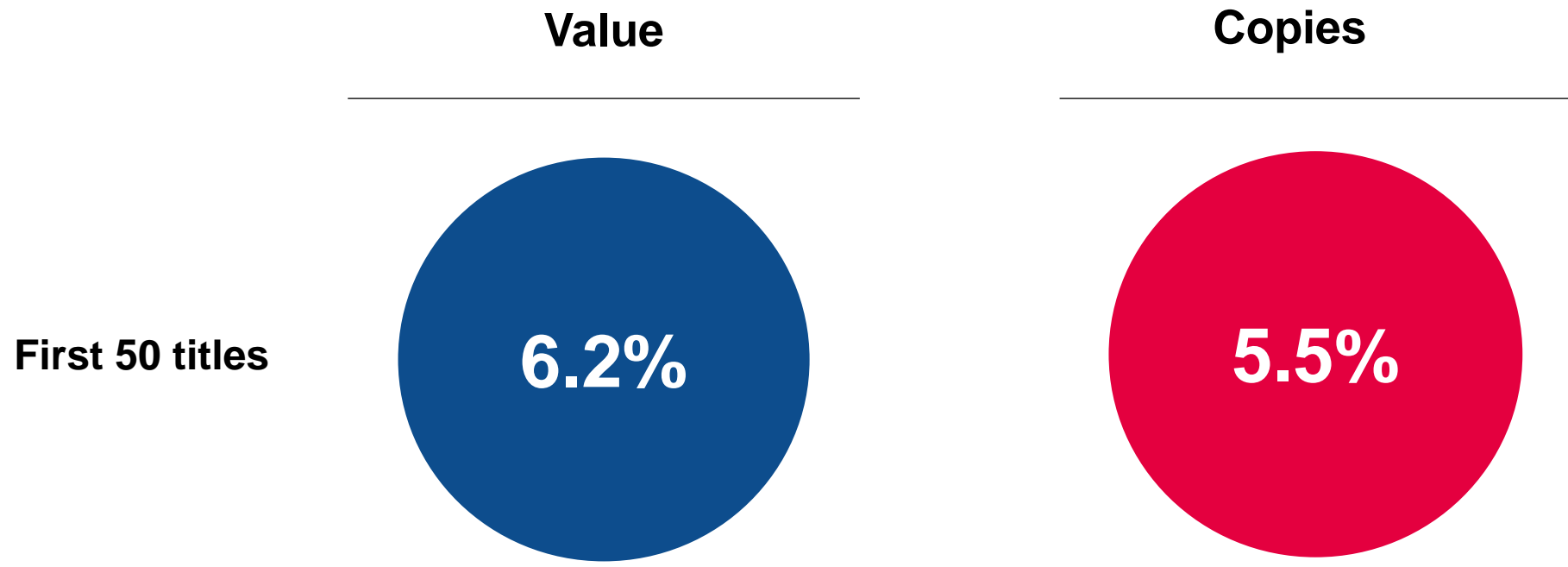
10



Io sono Giorgia, G. Meloni, Rizzoli (May 2021)

The entire market is moving. The Top 50 in the first nine months of 2021 account for 6% of value and 5% off copies

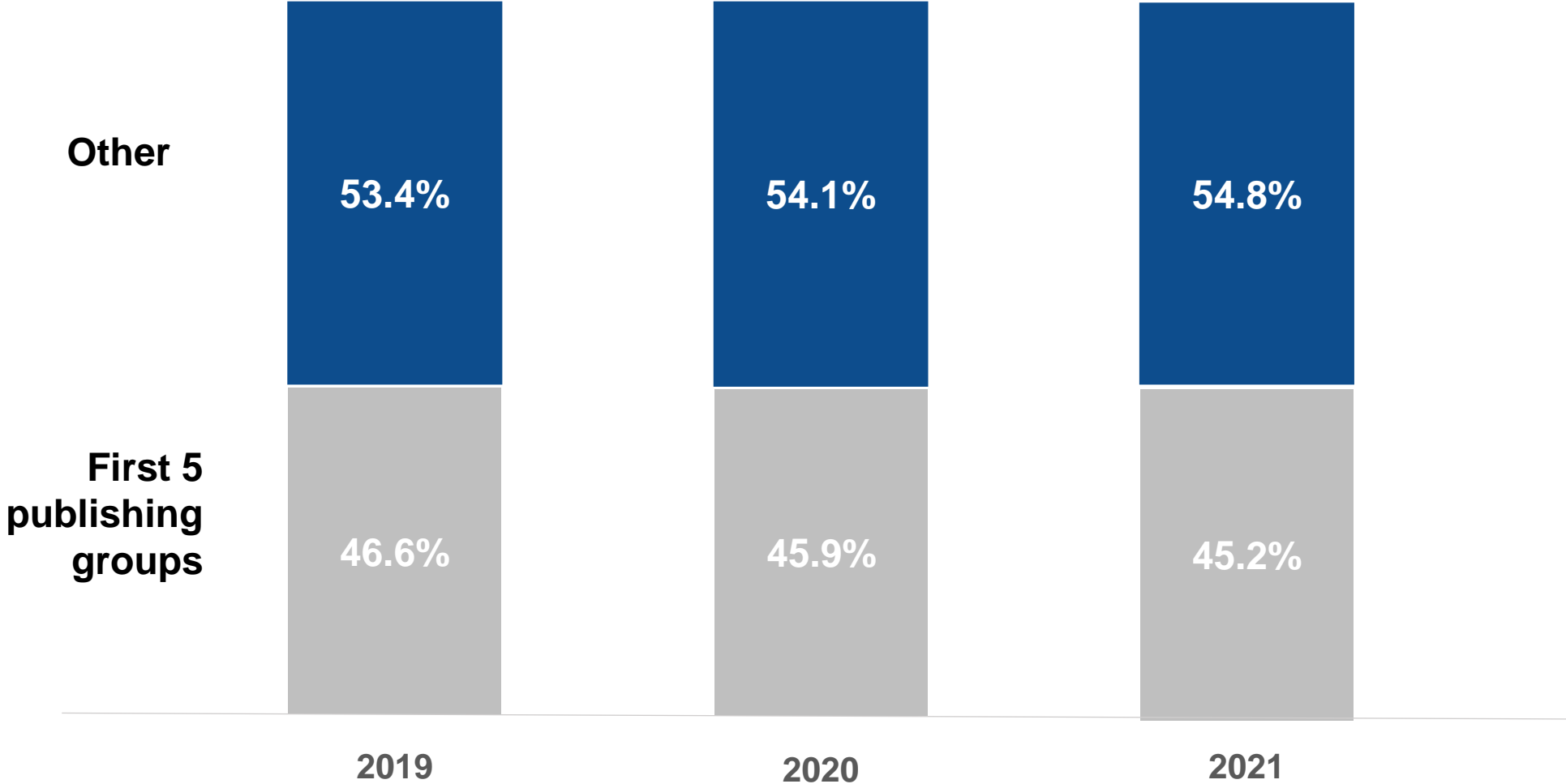
Values in percentages



Source: AIE [Italian Publishers Association] research department based on NielsenIQ data

How the market is divided between publishing groups and other publishers

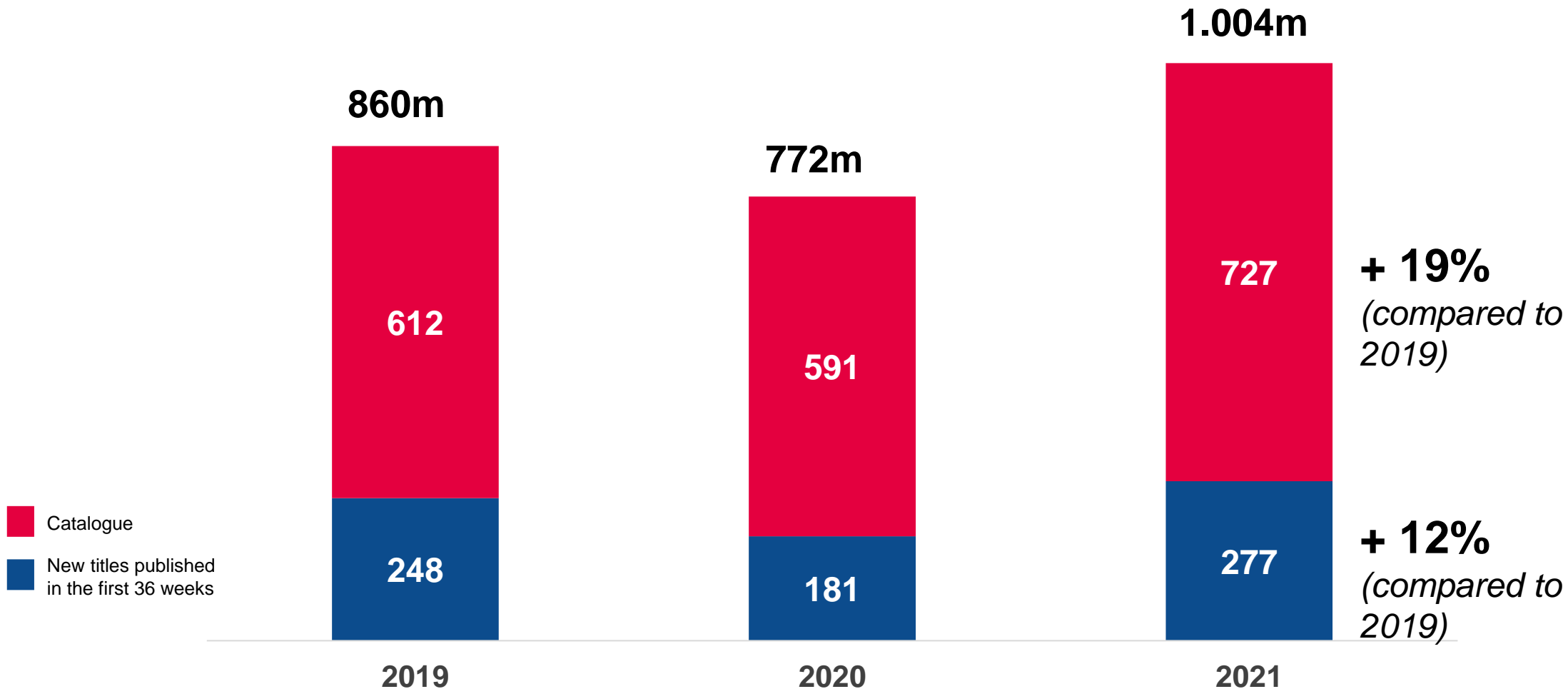
Values in percentages



Source: NielsenIQ

In the first nine months of the year, the market grows with new titles but even more so with the catalogue

Composition of sales between new titles published in the first 9 months of the year and those published in previous years (catalogue)

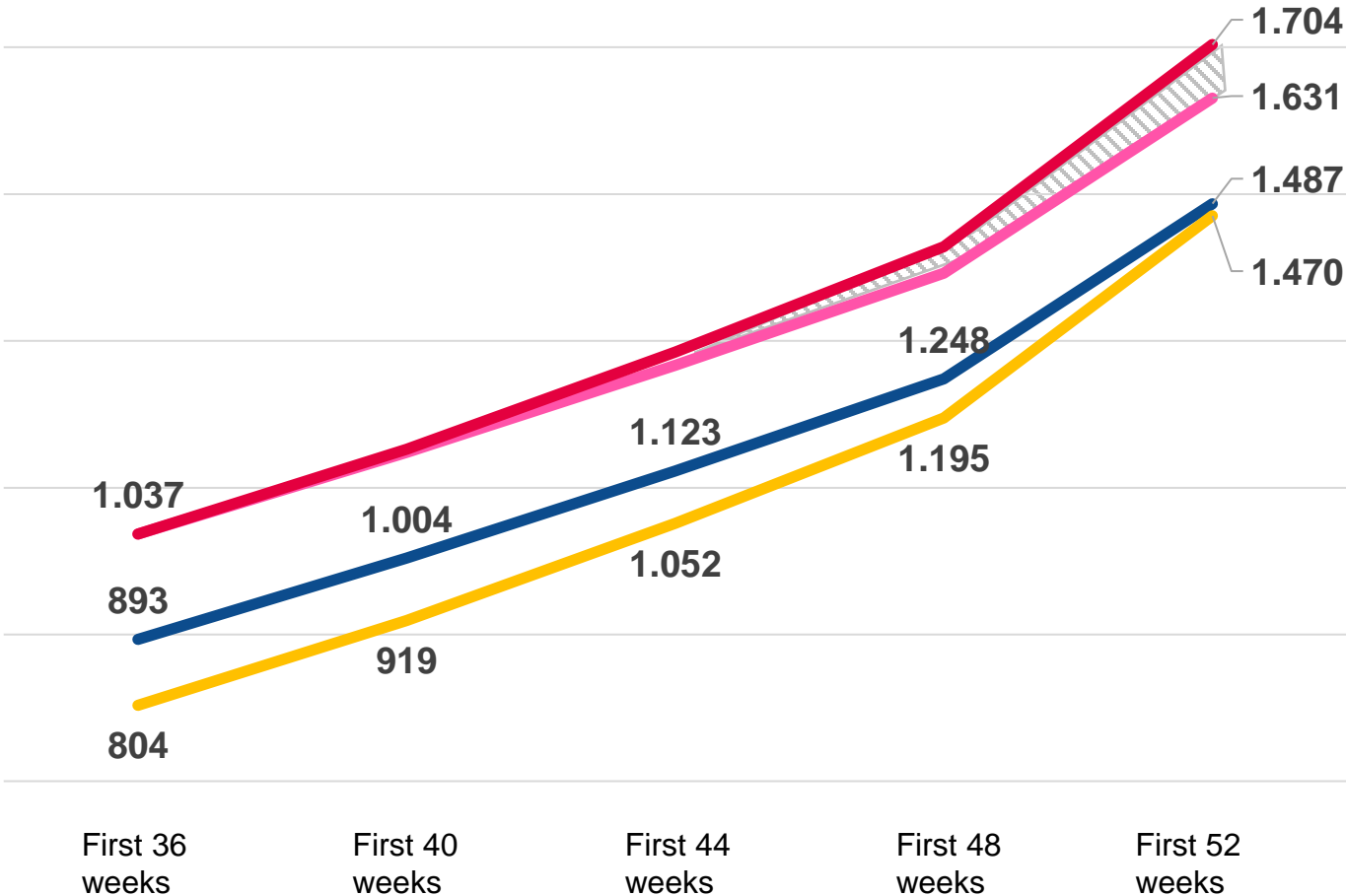


What we can expect from Father Christmas

Value in millions of euros and in percentage

A growth of between +11% and +16%

- 2019
- 2020
- 2021 (with 2019 performance)
- 2021 (with 2020 performance)





In the field of

