**The publishing sector in Spain A report**

**2014**

Federación de Gremios de

Editores de España

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**Book domestic market**

In 2015, the Federación de Gremios de Editores de España (FGEE) issued the 26th edition of its “Estudio de Comercio Interior del Libro en España” (Book Trade Domestic Market in Spain). The report produced by Conecta Research & Consulting, presents and discusses 2014 data on publishing and turnover of private publishing houses in Spain affiliated to the FGEE. It highlights the present situation of the book market and its main trends.

Report data -obtained through a questionnaire fulfilled by the publishers- show the following:

• The domestic market book revenue and the number of titles offered. Even if part of the private sector publishing remains out of the report, the statistic projections show that the study represents around 90% of the global revenue of the Spanish market.

• The employment in the book sector, the geographical distribution of the activity, the languages the books are published in, the paperback and the e-book edition, the prices broken down by subjects, the market channels and the sum payed to the authors. Special detail is given to de e-book edition.

Following are the main figures:

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| --- | --- |
| Private affiliated publishers | **768** |
| Employees (direct employment). | **12,413** |
| Published titles (including reprints) | **78,508** |
| Copies issued (thousands) | **226,591** |
| Average print run | **2,886** |
| Books on sale | **553,884** |
| Domestic market turnover (cover price) (mill. Euros) | **2,195.80** |
| Domestic market net revenue (mill. Euros) | **1517.49** |
| Copies sold (thousands) | **153,623** |
| Average Price (Euros)  | **14.29** |

After five years of decreasing sales, the publishing sector is recovering and new jobs have been created (a 1.4% increase).

In 2014 78,508 titles have been published, 2.7% more than in 2013; but the number of copies has decreased by 8%: 226.59 millions of copies. The average print run is lower than in the previous year: 2,888 copies; 300 copies less than in 2013.

In 2014, 153,623 thousands of copies were sold; a 67.8% of the total of copies printed (62.4% in 2013).

In 2014 the publishing sector had a turnover of 2,195.80 million Euros, a 0.6% more than in 2013 (2,181.97 million Euros). In constant prices, the increase would be of 1.7% and the price per copy has been of 14.29 Euros.

Breaking down the turnover by subjects, 34.1% is the share of Non-university Textbooks and 20.4% the one for Fiction. Together with Teenage and Children (12.5%) and Social Sciences and the Humanities (10.8%) they sum up to 77.8% of the global turnover.

* The turnover for Fiction was 447.10 million Euros in 2014 (20.1% of that figure is obtained from paperback edition)
* The turnover of Teenage and Children in 2014 was 275.19 million, a 3.0% more than in 2013.
* The increase of Non-university Textbooks turnover (748.64 million Euros) was a 3.1%.
* The turnover for Social Sciences and the Humanities has been 236.63 million Euros, a 2.7% more than in 2013.
* The turnover of STM and University books in 2014 was 81.8 million de Euros, a 16.8% more than in 2013.
* Self-help books: 146.35 million Euros (3.2% more)
* Reference books: 40.79 million Euros (10.6% less)
* Comic, with 58.80 million Euros, increases its turnover by 2.7%.

As for the distribution channels:

* Bookshops and Bookstore Chains, with 735.78 million Euros had a share of 50.1% of the distribution, a decrease of 4.8%. Bookstore Chains had a turnover of 365.41 million, a 5.7% more than in 2013.
* Hypermarkets shared 8.5% of the sales, with 185.65 million Euros, a decrease of 8.7%.
* Summing up Bookshops, Bookstore Chains and Hypermarkets, the share of distribution decreased by 2.7% in the last year.
* The Kiosks sales change the recent year’s trend of decrease with a turnover of 80.76 million Euros, a 2.2% more.
* Sales through companies and institutions decrease by 2.1%, and Libraries share increases by 11.4%.
* Direct sales to consumers increased by 0.6%.
* Digital books distributors share a 5.0% of the global turnover, a 37.1% more than in the previous year.

**Books Export**

The Spanish book sector has a long tradition of export and, in Spain, is one of the more international: there are more than 175 subsidiaries, belonging to 28 publishers, some of them older than sixty years. They generate important sales figures in their countries, maybe around 3,000 million Euros.

In 2015, the *Asociación de las Cámaras del Libro de España* (formerly *Federación Española de Cámaras del Libro*) issued a report on the Spanish books sector export in 2014. This report -a tradition 22 years old- deals mainly with goods exported and publishing rights sales.

In 2014 the global book export was of 541.77 million Euros (526.48 in 2013); an increase of 2.9%. Since 2010 there has been every year an increase, except in 2013; the total increase of this five year period is 18%, due mainly to the Latin-American market and the recovering of instalments and other kiosk material, and also due to the good figures of printing sector exports.

Breaking down the figures by sectors, 347.42 million Euros (462.07 million US Dollars) correspond to publishing sector and 193.34 million Euros (258.48 million US Dollars) to the printers. The last ones share is 35.7% and the publishing share is 64.13%; this one can be split in 35.89% for books, 19.76% for instalments and kiosk materials, and 8.48% for other products. The biggest part of the printing sector exports correspond to books -more than 120 million Euros (22.17% of total exports).

As for the countries to which Spain exports, in 2014 59.86% went to the European Union: 45.85% from the publishing sector and 54.15% from the printing sector, a balance that is not new. In Latin America, 95.56% corresponds to books. The printing sector in Spain has very competitive prices for the EU region.

The share of the publishing sector has been in 2014 of 42.79%. 301.51 million Euros correspond to de the product book.

The import was in 2014 of 212.71 million Euros (203.76 million in 2013) and there are some important changes: newspapers and magazines represent only 36% (73.37 million Euros); books imports are 19% (38.84 million Euros); the biggest part goes to printing and co-editions works, with a 44% (89.57 million Euros). These changes reveal the growing impact of globalization.

The trade balance gives a positive result of 329.06 million Euros (322.72 in 2013), an increase of 1.9%. According to data from the Book Chambers of the Basque Country, Catalonia and Madrid (without their collaboration these studies couldn’t have been done) the publishers’ exports to the Americas was no less than 30 million Euros, directly from printing industries located in Asia.

Not to forget that publishers sold 66.6 million Euros for publishing licenses, 10.1 million Euros more than in 2013.

In conclusion, 2014 has been a good year for the foreign trade of the sector and we should highlight:

* The book sector exports grow by 2.90%.
* The Americas are the main market for the publishers of books in Spain.
* But the European Union is the first destination of the exports if the instalments are included.
* The export of instalments and kiosk material increases by 2.72%.
* The exports of textbooks of Spanish language continue due to a continuous promotion projects.
* North America is one of the most important markets for our books. Even though the direct export to that destination has suffered an important decrease in the last decade, the Spanish companies maintain a strong position trough shipping from Latin-American countries and indirect exports from China.
* The imports increase by 4.39%. The printing works sub-contracted to Asian countries decrease by 4.74%. 36% of our imports are of newspapers and magazines, and 42% printing works and co-editions.
* The financial balance of the book sector is very positive, totaling in 2014 329 million Euros.