**The publishing sector in Spain A report**

**2015**

Federación de Gremios de

Editores de España

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**Book domestic market**

In 2016, the Federación de Gremios de Editores de España (FGEE) issued the 27th edition of its report on the domestic book trade market in Spain). The report presents and discusses 2015 data on publishing and turnover of private publishing houses in Spain affiliated to the FGEE.

The report highlights the present situation of the book market and its main trends. The report data are obtained through a questionnaire fulfilled by the publishers (domestic market turnover, number of books on sale, number of employees, geographical distribution of the market, languages of the publications, price of the books, market channels, and so on)

Following are the main figures:

|  |  |  |
| --- | --- | --- |
|  | **2015** | **% 2015/2014** |
| Private affiliated publishers | **775** | **0,9** |
| Employees (direct employment). | **12,532** | **1.0** |
| Published titles (including reprints) | **80,181** | **2.1** |
| Copies issued (thousands) | **225,277** | **-0.6** |
| Average print run | **2,810** | **-2.7** |
| Books on sale | **586,811** | **5.9** |
| Domestic market turnover (cover price) (mill. Euros) | **2,257.07** | **2.8** |
| Domestic market net revenue (mill. Euros) | **1,573.44** | **3.7** |
| Copies sold (thousands) | **155,436** | **1.2** |
| Average Price (Euros) | **14.52** | **1.6** |

Data obtained in 2015 seems to confirm the turnaround initiated in 2014: the recovery of the growing of the publishing sector in Spain. In 2015 the employment in the sector grew a 1%.

In 2015 80,181 titles have been published, 2.1% more than in 2014 and the number of copies decreased by 0.6%: 225.27 million. The average print run is lower than in the previous year: 2,810 copies, 2.7 less than in 2014. In 2015, 15,436 thousands of copies were sold 1.2% more than in 2014; a 69% of the total of copies printed.

In 2015 the publishing sector had a turnover of 2,257 million Euros; the average price per copy was of 14.52 Euros compared with 14.29 Euros in 2014.

Breaking down the turnover by regions, Madrid, with a 43.4% and Catalonia with 49.5% represent the 92.9% of the total turnover (91.5% in 2014).

By subjects, 36.8% is the share of Non-university Textbooks (34.1% in 2014); 19.5% is the share for Fiction (20.4% in 2014); Teenage and Children share is 11.5% and Social Sciences and the Humanities is 10.5% (10.8% in 2014). These four subjects sum up to 78.3% of the global turnover (77.8% in 2014).

* The increase of Non-university Textbooks turnover (830.31 million Euros) was a 10.9%.
* The turnover for Literature was 441.00 million Euros in 2015 (21.4% of that figure is obtained from paperback edition). From these figures, fiction books were 90.57% of the turnover and 87.7 of the copies sold. Contemporary fiction has been 56.7% of the fiction turnover.
* The turnover of Teenage and Children in 2015 was 258.82 million, a 5.9% less than in 2014.
* The turnover for Social Sciences and the Humanities has been 237.51 million Euros, a 10.5% more than in 2014.
* The turnover of STM and University books in 2015 was 95.34 million de Euros, a 16.5% more than in 2014.
* Self-help books: 133.5 million Euros (8.8% less than in the previous year)
* General interest books had a turnover of 134.72 million Euros in 2015, a 1.0% less than in the previous year.
* Reference books with 40.92 million Euros decreased a 0.3%.
* Comic, with 60.68 million Euros, increases its turnover by 3.2%.

As for the distribution channels:

* Bookshops and Bookstore Chains, with a share of 52.6% of the distribution are the main channel.
  + The Bookshops had a turnover of 788.37 million Euros, a 7.1% more than in 2014.
  + Bookstore Chains had a turnover of 398.88 million, a 9.2% more than in 2014.
* Hypermarkets sold books for 182.91 million Euros, a decrease of 1.5%.
* Summing up Bookshops, Bookstore Chains and Hypermarkets, the share of distribution increased by 6.5% in the last year.
* The kiosks, companies and institutions, and libraries sales kept stable figures in 2015.
* Direct sales to consumers decreased by 1.6%.
* Digital books distributors share a 5.1% of the global turnover, a 4.9% more than in the previous year.

The sales of paperback books continue decreasing. In 2015, the turnover was of 94.57 million Euros, a 9% less than in 2014, although the number of titles increased by 16.5%; a total of 4,211 titles were published. The average print runs -4,067 copies- decreased by 23.5%. The number of copies sold was of 12.2 million, a 15.3 less than in the previous year.

The turnover of the paperback books is a 4.2% of the total and represents 7.6% of the copies printed. The average price has been of 7.76 Euros.

**Books Export**

The *Asociación de las Cámaras del Libro de España –FEDECALI-* formerly *Federación Española de Cámaras del Libro*, whose members are the Book Chambers of Catalonia, Basque Country and Madrid, that, in turn, are composed of publishers, printing industries, wholesalers and booksellers are headed always by the President of the FGEE. FEDECALI has been publishing, for more than twenty years a report on the Spanish books sector export and import activities. Following, we highlight the main results of the 2015 report (24th edition).

In 2015 the global book export was of 552.366 million Euros, an increase of 1.96% more than in 2014. Breaking down the figures by sectors, 358.817 million Euros correspond to publishing sector and 193.549 million Euros to the printing sector. The publishing sector increased its sales by 3.28% and the printing sector decreased by 0.41%

As for the book export in 2015, the publishing sector exported 311.49 million Euros (87% of its total export) and the printing sector 122.05 million Euros (63% of its total export).

The import was in 2015 of 227.98 million Euros; books imports are 19% (43.92 million Euros); the rest was for printing and co-editions works, with a 44% (99.84 million Euros), newspapers and magazines (36%, 82.12 million Euros) and other products (1%, 2.11 million Euros). The global imports increased by 8% in relation to 2014 as a consequence of more printing works made by foreign companies.

The trade balance was again positive: 324.39 million Euros even if it decreased by 1.42%.

The publishing licenses sold in 2015 by the sector were of 70.6 million Euros, a 6.3% more than in 2014.

Europe and America are the main markets for the Spanish book trade. European exports increased by 4.6% in 2015 (347 million Euros). The exports to America also increased by 1.9% (186 million Euros). To note that part of the Spanish trade in America is done through the subsidiary companies in Latin-American countries, so they don’t appear in the previous figures. The exports to other continents have decreased.

The main markets for Spanish exports are France (151.04 million Euros), less than in the previous year. Portugal (67.06 million Euros) increased its sales, as well as did Mexico (61.40 million Euros) and United Kingdom (48.79 million Euros). Italia also bought more books to the Spanish publishers (23.10 million Euros).

In conclusion:

* The book sector exports grew by 1.96%.
* The Americas are the main market for the publishers of books in Spain.
* But the European Union is the first destination of the exports.
* The export of the traditional book keeps its positive trend in Europe.
* The export of instalments and kiosk material increases by 7.96%.
* 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 11.88%. The printing works sub-contracted to Asian countries increase by 8.74%. 37% of our imports are of newspapers and magazines, and 43% printing works and co-editions.
* The financial balance of the book sector is very positive, totaling in 2015 324 million Euros.