

# The German book market and Börsenverein

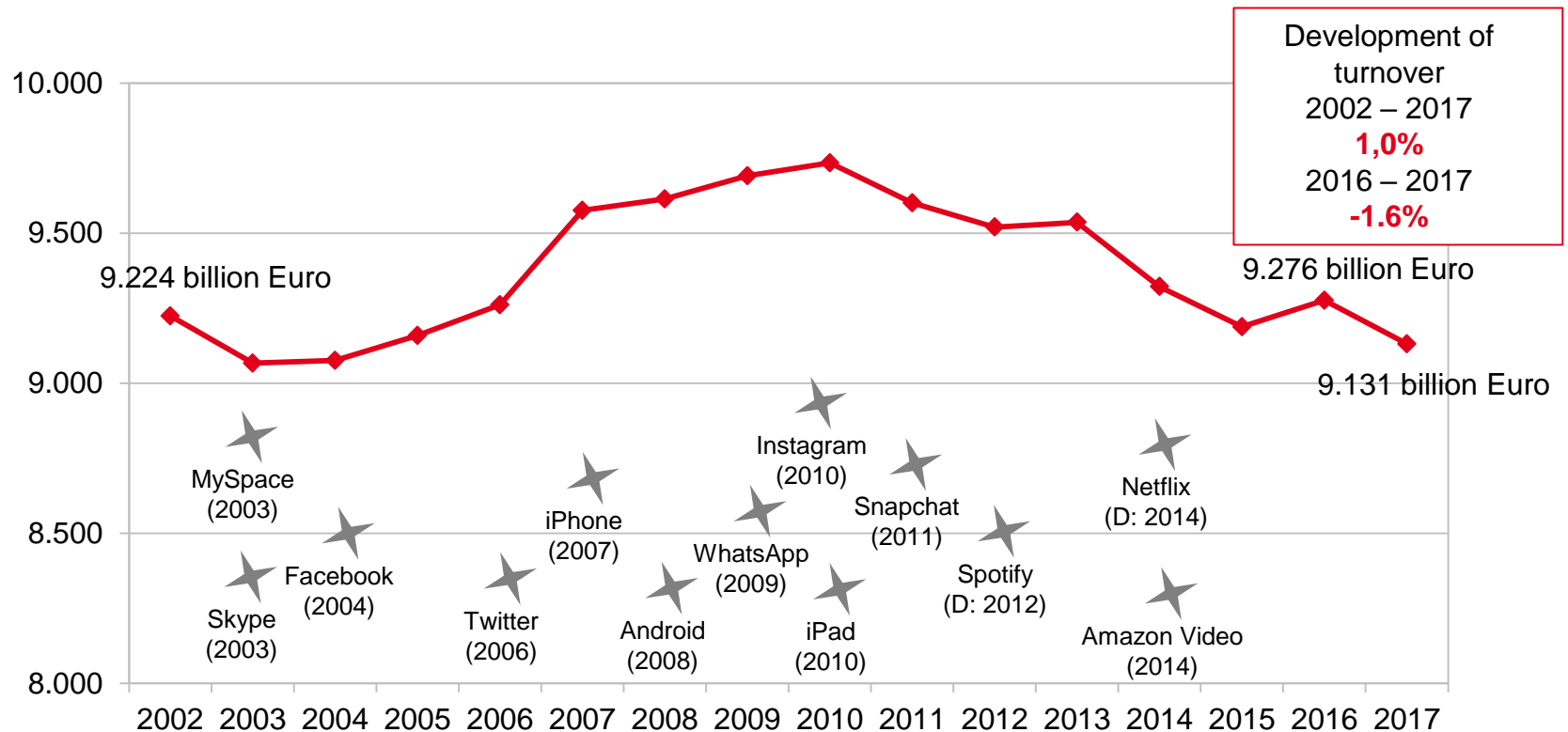
Munich, July 2018

## Germany's book market is one of the largest in the world

- In 2017, the German book market was once again a very important book market
- Book market turnover: €9.13 billion
- In terms of population size and turnover, the German book market tops the list in international comparison
- Wide range of books available
- Nationwide supply through bookstores

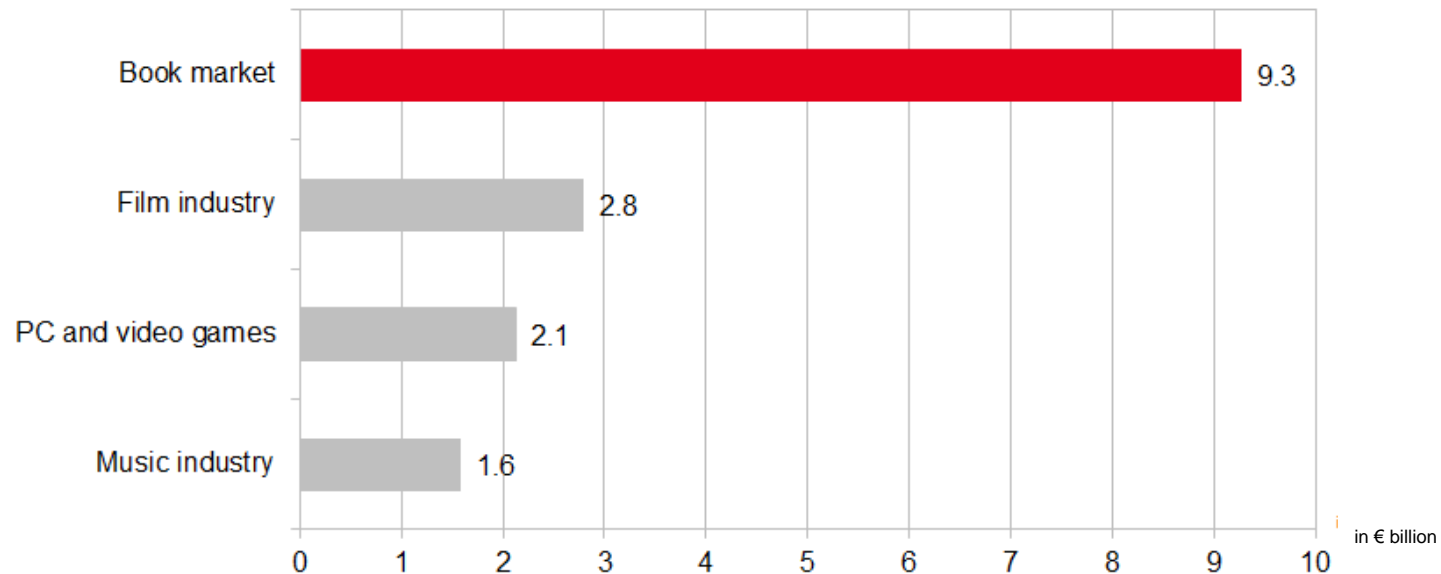


## Book industry from 2006 to 2017 in € million

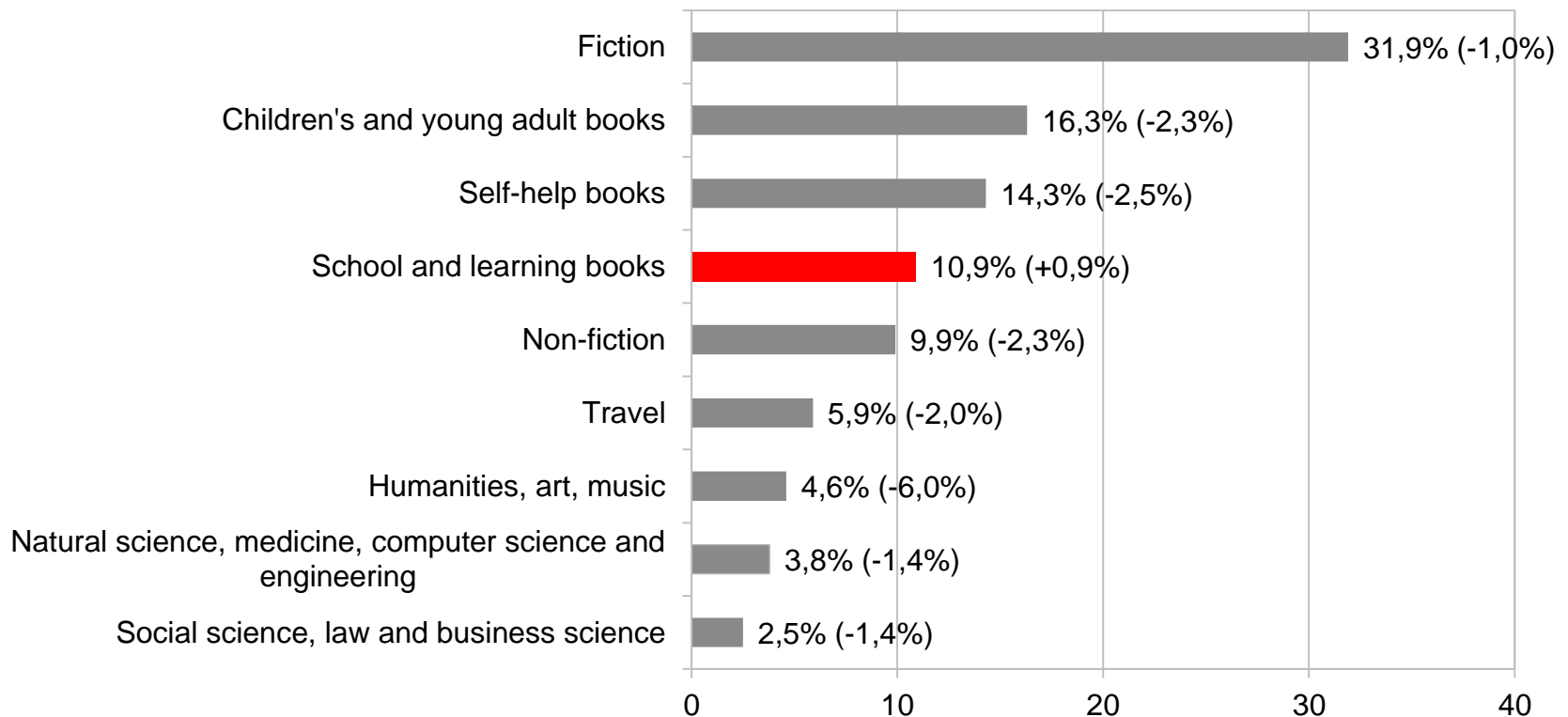


## The book market is an important creative industry

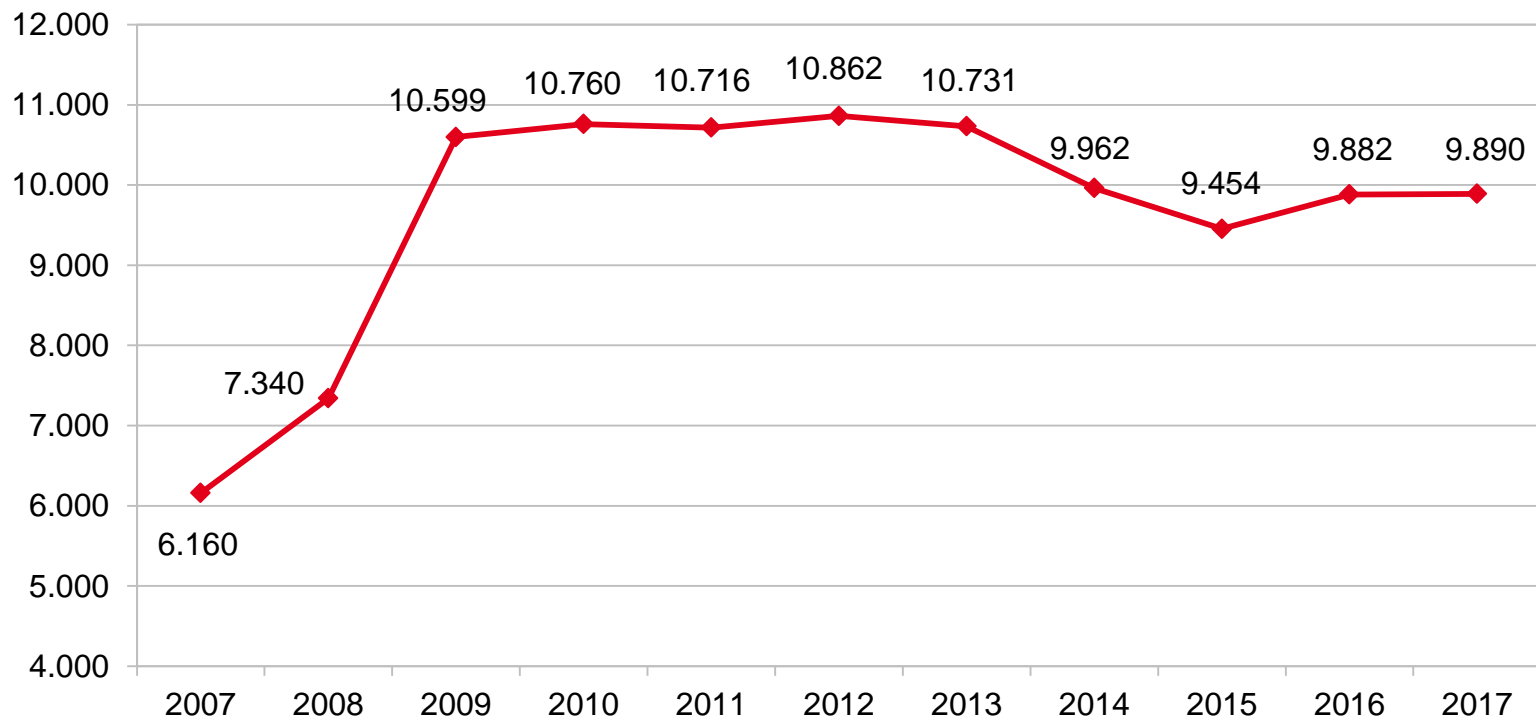
- In **2016**, the German book market generated revenues of €9.3 billion (2017: 9.13 billion)
- Comparison: €1.6 billion for physical & digital music and €2.8 billion for film industry



## Market share by category in 2017 (change in comparison to the previous year)

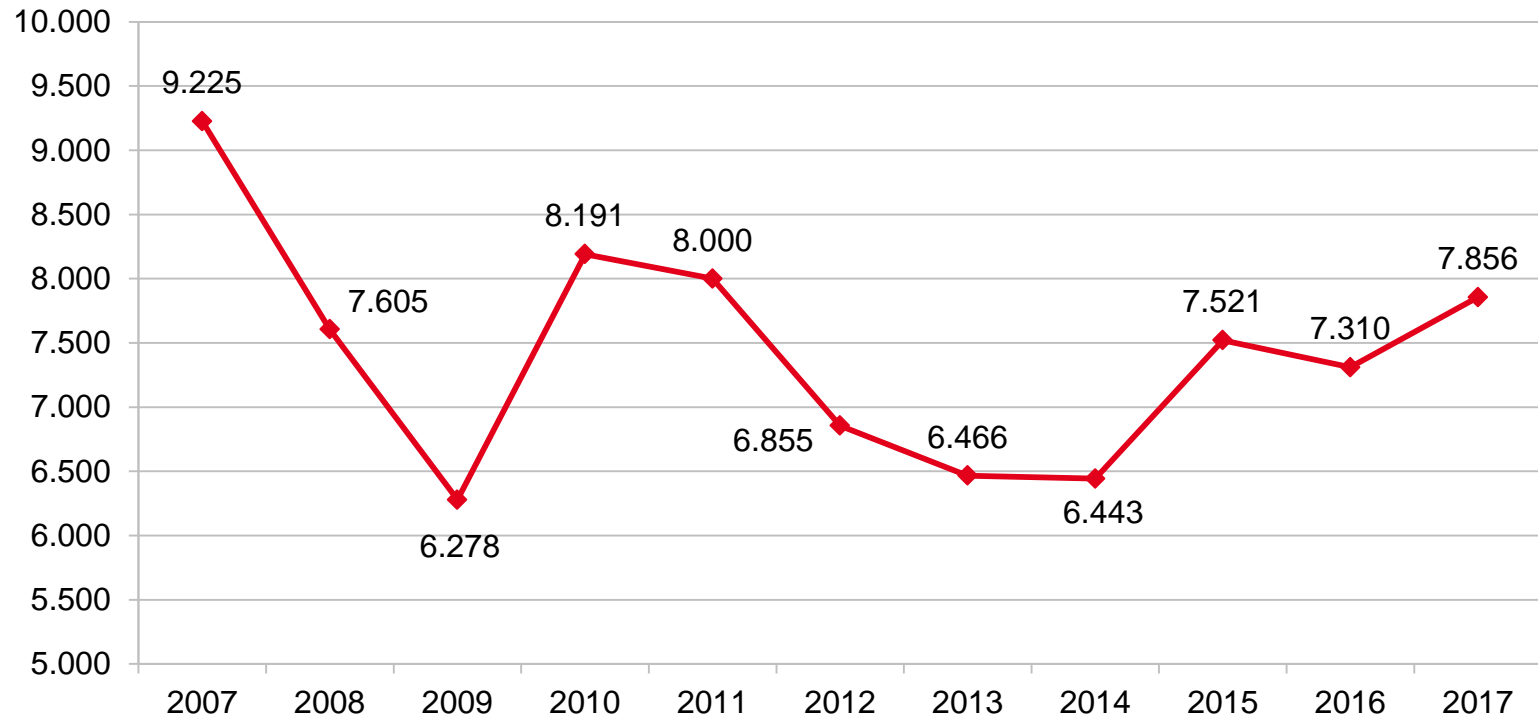


## Translations of first-edition titles into German 2007 to 2017



Source: Deutsche Nationalbibliografie, VLB  
Calculation: Börsenverein des Deutschen Buchhandels

## Licences from 2007 to 2017



Source: Lizenzumfrage, Börsenverein des Deutschen Buchhandels

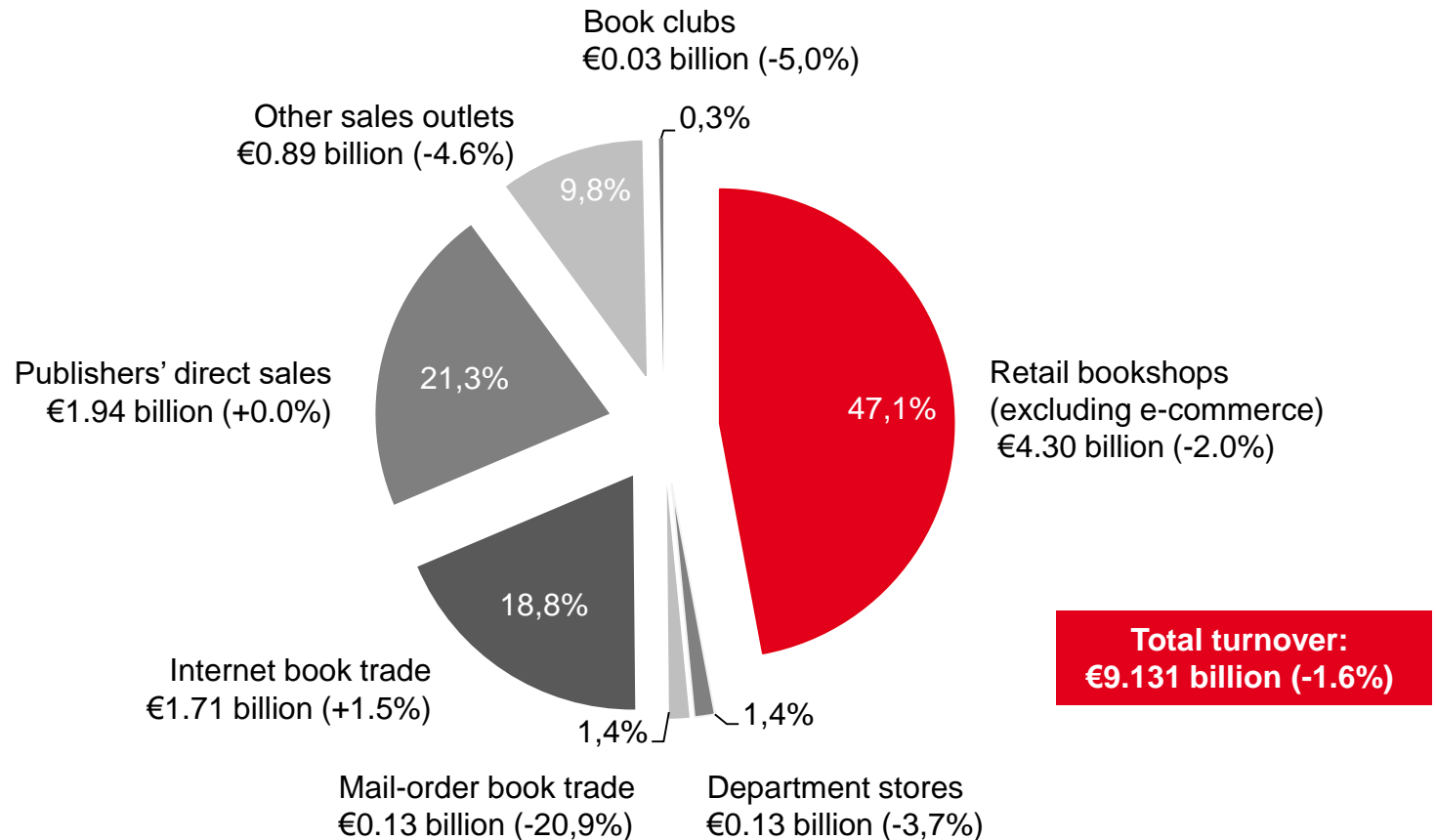
## New titles, translations and licences in 2017

- Roughly 2 million available titles
- 72,499 new publications (first editions)
- Of those, 9,890 are translations (first editions),  
Most important languages of origin: English, French, Japanese
- 7,856 license agreements,  
Most important languages in the licensing business: Chinese, English, Spanish  
Especially popular in the licensing business: German books for children and young readers (38.7 percent of all licences)



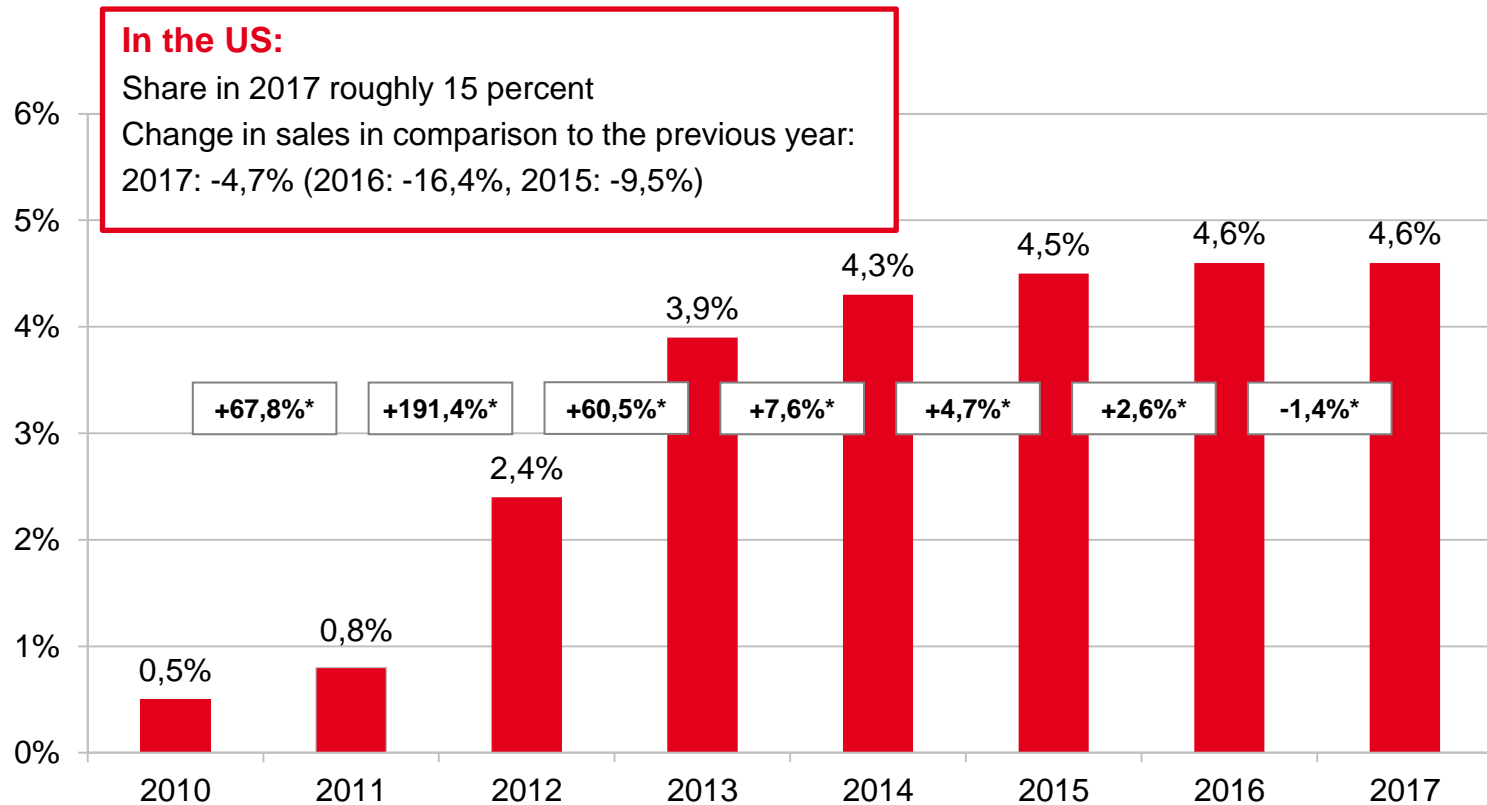


## Estimated turnover per distribution channel in 2017



Source: Börsenverein des Deutschen Buchhandels

## Share of e-book sales on the book market\* 2010-2017 (in percent)



Source: GfK Consumer Panel Media\*Scope Buch  
USA: Association of American Publishers

\* Change in sales in comparison to the previous year

## Publishers in Germany

- Roughly 3,000 publishing houses
- Workforce of 24,100 employees (2015)
- Distribution of sales among the 100 largest publishers:
  - 50% science and special interest
  - 33% general interest (fiction, non-fiction, self-help books)
  - 17% education
- Largest publishing groups:

**SPRINGER NATURE**

  
VERLAGSGRUPPE  
RANDOM HOUSE  
BERTELSMANN

*westermann*

 **Klett**

## Bookshop landscape in Germany

- Roughly 6,000 bookshops (incl. branch stores/bookselling outlets)
- Workforce of 28,800 individuals (2017)
- Roughly 90% are small, independent bookshops
- Largest chains:



**Weltbild**

**Hugendubel**  
Die Welt der Bücher

- Strong regional branches: Osiander, Mayersche, Rupprecht
- The number of bookshops is decreasing
- Trend: fewer large spaces, less retail space

## The online trade of German bookstores

- More than 80% of the bookshops have a website and a webshop
- Around 79% of bookshops sell e-books and e-readers

### *Tolino eReading made in Germany*

Open e-reader system

1,500 participating bookshops

Market share: roughly 40%



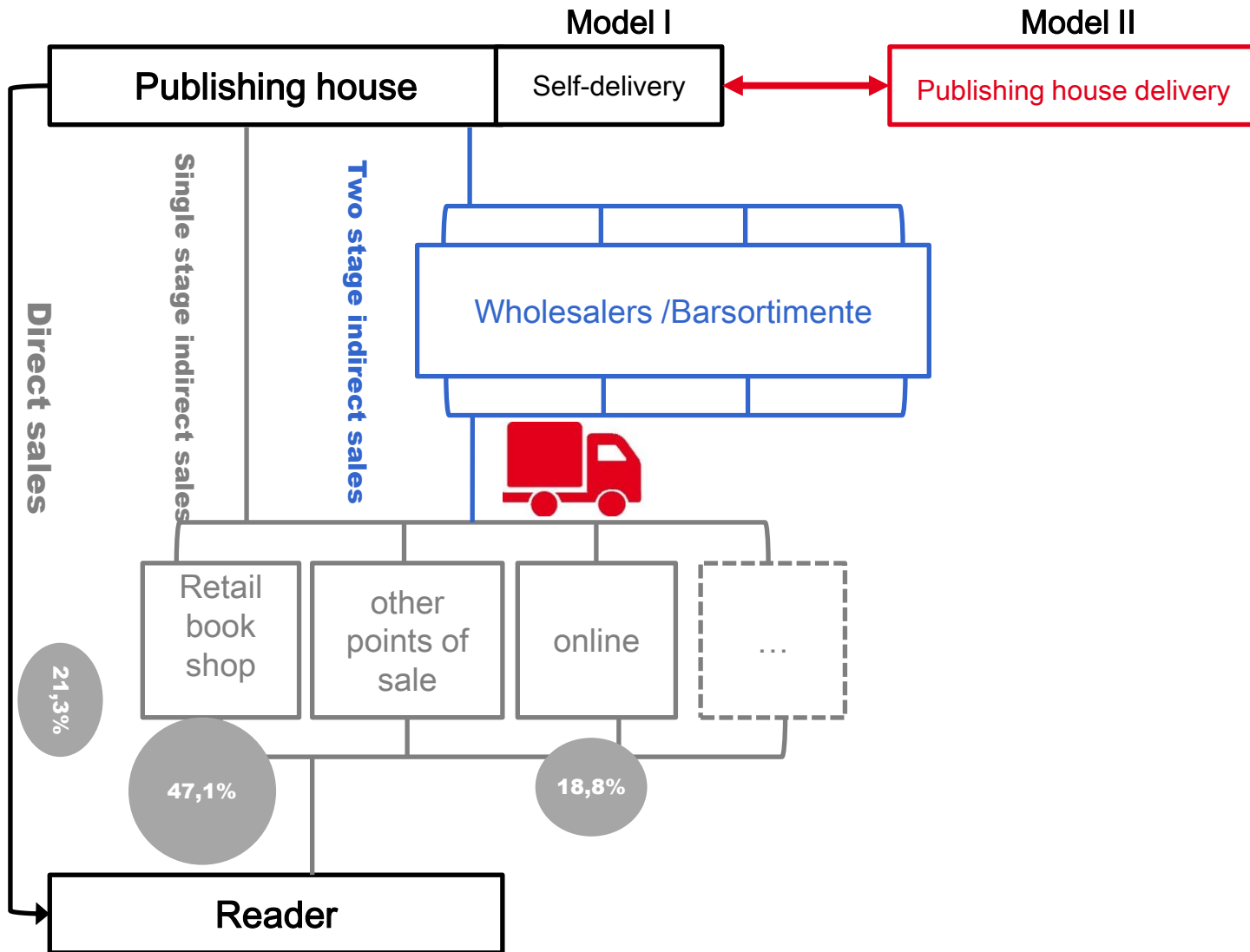
## Bookshop landscape in Germany

- Bookshops are places where people meet
- Evenings with authors, book signings, discussions, presentation of the programmes from publishing houses...
- Part of the community of a neighbourhood/ village
- Trips to book fairs, cooperation with schools...
- Newsletters, magazines, personal recommendations of the bookseller, activity in social media



## Wholesale book trade

- Point of interface between manufacturing book trade and distributing book trade
- Wholesale covers more than 90% of the needs of retail bookshops.
- Sophisticated, time-tested logistics: as a general rule, books are available within 24 hours!
- Just-in-time service: overnight delivery of available books to bookshops.



**Service  
provider**

**wholesale**

**Retail**



## Overall framework in Germany

### Fixed prices

- Each title is sold for a certain price which is fixed and applies whenever or wherever the title is sold; this system of pre-set prices helps generate a diverse and intact environment for the book trade.
- This industry-wide agreement has been in place since 1888 and was enshrined in law in 2002 thanks to the “Buchpreisbindungsgesetz”, Germany’s official fixed-price system for books; this law has also applied to e-books since 2015.

### Reduced VAT rate

- 7% on printed books and physical audio books
- 19% on e-books and on audio downloads
- Börsenverein has consistently called for application of the reduced VAT rate on ebooks, ongoing legislative procedure at EU level

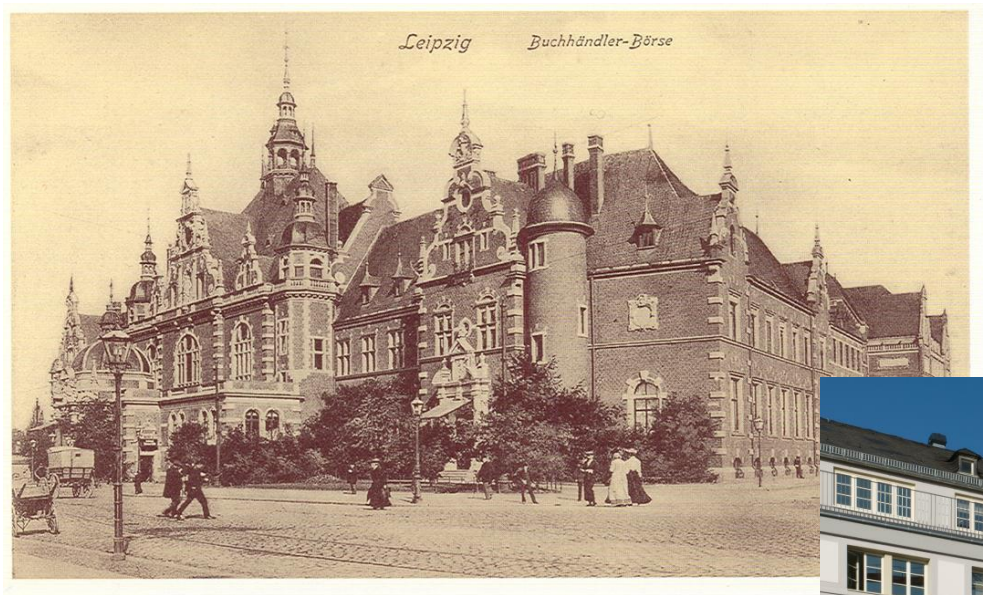
### Copyright

- Firm commitment to strong copyright laws and fair publishing laws
- e.g. in the form of new laws, combating internet piracy, copyright contract law

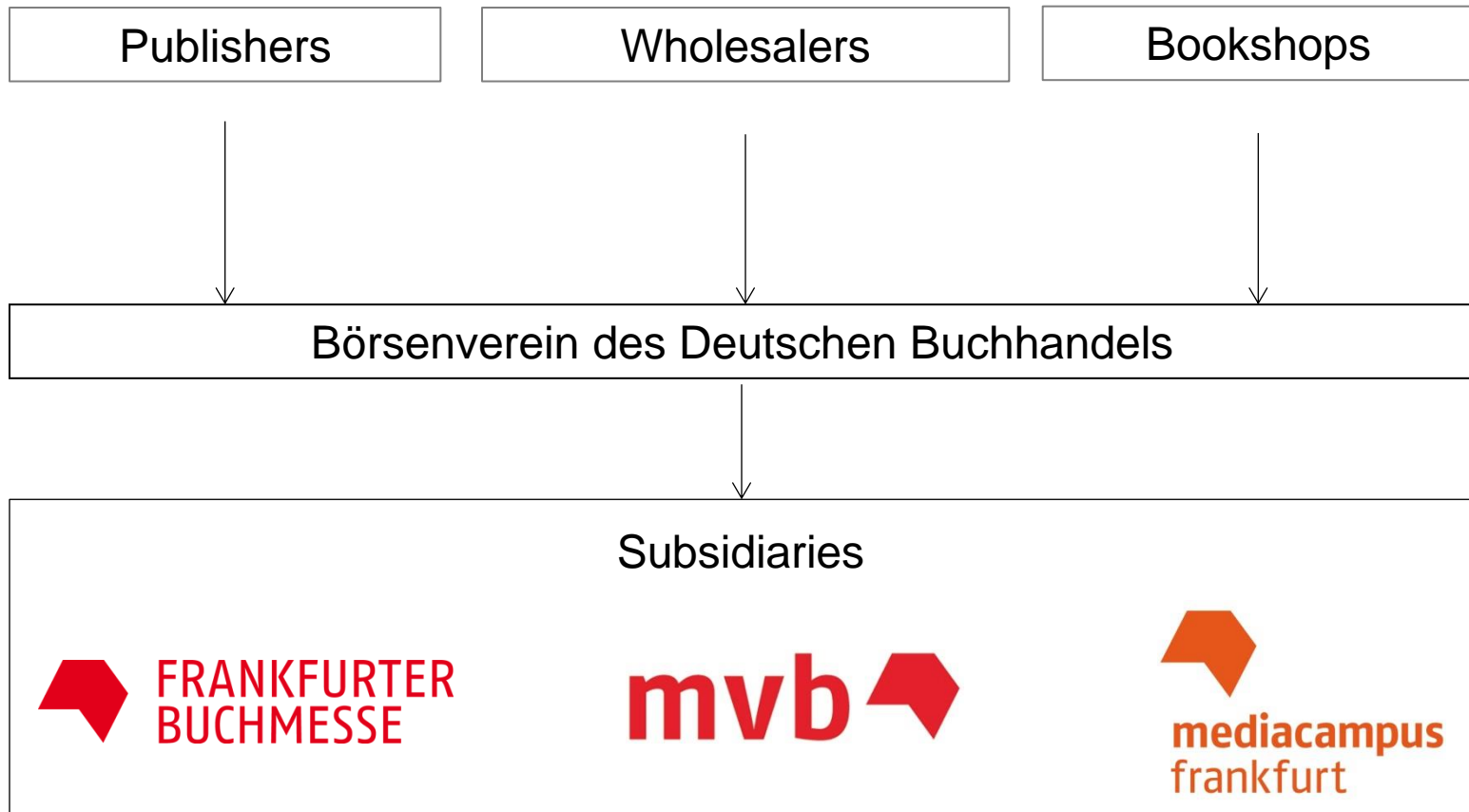
# Börsenverein – The German Publishers and Booksellers Association

Structure, goals & activities

## Then ... and now



## Structure



## Börsenverein

- ~ 5,000 members
- leading national association of the German book industry
- Börsenverein is both a trade association and a cultural organisation
- Close cooperation with the associations in Austria and Switzerland

## Tasks & responsibilities

### **Activities in economic and political spheres**

- Working to preserve and improve economic conditions for our members; lobbying activities on their behalf in Berlin, Brussels (FEP, EIBF) and Geneva (IPA)
- Legal work: test cases, monitoring and support for legislation
- Balancing interests among members

### **Services for members**

- Legal and business advice
- Databases, marketing, market research, congresses, networks
- Support and promotion of innovative ideas benefiting the industry

### **Cultural work**

- Cultural projects: Peace Prize of the German Book Trade, German Book Prize, Public Reading Competition, World Book Day



## Freedom of expression

**FÜR DAS WORT  
UND DIE FREIHEIT**



## German Book Prize

- Börsenverein has awarded the German Book Prize to the **German-language novel of the year** since 2005.
- The goal of this independent literary prize is to showcase German writers and the German book industry beyond Germany's borders. It also seeks to foster reading and an appreciation for books as cultural goods.
- Endowed with €25,000
- Each year, the German Book Prize Academy chooses the members of a new jury. In turn, the jury chooses the winners – first from a longlist and then from a shortlist.
- Publishing houses from Germany, Austria and Switzerland are invited to submit two books to the jury



## German Book Prize



2017  
deutscher  
buch  
preis



## Peace Prize of the German Book Trade

- The Peace Prize of the German Book Trade is awarded annually by Börsenverein to a personality whose literary, artistic, scientific or academic work has contributed to peace and understanding among the people of the world.
- Awarded since 1950 in the **Church of St. Paul in Frankfurt** at the end of the Frankfurt Book Fair
- Prize-winners are chosen by a Board of Trustees that makes its decisions independently and in confidential deliberations
- Endowed with €25,000

## Peace Prize of the German Book Trade





## Book marketing campaign: "Jetzt ein Buch!"



*Wir legen Bücher  
ans Herz und  
nicht bloß in den  
Versandkarton.*

nur in Bundesliga-Städten immer ein  
offer: [www.buchhandlung-finden.de](http://www.buchhandlung-finden.de)



# Innovation

## **CONTENTshift - The content industry accelerator**

- CONTENTshift is an international funding programme for startups that are active in the content industry.
- Make use of the synergies between startups and established companies by bringing them together
- Five nominees per year who participate in the programme
- Winners: Papego (2016, Germany), WriteReader (2017, Denmark)

# Merci beaucoup! Thank you!

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