

PRESS INFORMATION

THE MARKETS – Global Publishing Summit 2016

Visionaries, Analysts, Business partners

Market overview for Poland: Last Hope for Fixed Book Prices?

Frankfurt, 23 March 2016 – Following its successful debut in 2015, Frankfurt Book Fair's opening conference THE MARKETS will once again shift the focus to seven book and media markets. The markets in 2016 are:

- **Poland**
- Brazil
- United Kingdom
- The Netherlands & Flanders
- The Philippines
- Spain
- United Arab Emirates

Important publishers, strategists and industry experts from the countries named will be invited to present their respective markets with analysis, personal tips on upcoming developments and trends on Tuesday, 18 October 2016. The single day conference is organised by the Frankfurt Book Fair in cooperation with *Publishing Perspectives*, the renowned trade journal for the international book industry.

Book market Poland: Fight over discounts in book selling

It is a fight with no holds barred: with discounts of up to 50 percent, Poland's publishers and booksellers vie for rare readers. According to the Polish Book Institute (2014), 58 percent of the country, with amounts to 40 million people, does not read books. Only 2 percent of the Polish population buys more than seven books per year.

The levy of VAT of 5 percent, introduced in 2011, lower income rates and the rise of ecommerce exacerbates the crisis surrounding printed books, which has had a lock on the Polish book market since 2010. Since then sales have sunk from 735 to 582 million euros (2014). Following a modest recovery of 0.4 percent in 2013, sales once again slipped by 7.5 percent. This excludes the children's literature market, along with textbooks and reference books, as well as illustrated books, which were able to record slight increases.

The Polish book market currently makes up 3 percent volume of the European market, according to the Polish Chamber of Books (PIK). Industry experts expect further drops in sales in the future and an increased level of competition between the publishers. In 2014 the number of employees in the publishing industry sank by 4.5 percent to 5,260.

Industry associations place great hopes in a fixed book price agreement following the model of Germany and France. A corresponding piece of legislation was introduced in 2014, but became obsolete after the elections in October 2015.

More titles, lower print runs

There were 32,480 titles published in Poland in 2014 (2013: 29,710), including 18,870 new publications (2013: 15,580). At the same time, the total amount of printed book copies sank by 6.5 percent to 105.1 million copies (2013: 112.4m) as well as the average print run of 3,236 copies (2013: 3,783). In comparison: in Western Europe the average print run is fifteen thousand copies.

Translated around the world

In 2014, around 20 percent of all titles (6,700) were translations. Following English (3,963 titles), German is the second most important language of origin when it comes to translations into Polish.

The most popular Polish authors abroad include Czesław Miłosz (translated into 52 languages), Tadeusz Różewicz (51), Janusz Korczak (50), Wisława Szymborska (50), the former Pope Karol Wojtyła (50), Stanisław Lem (47), Jarosław Iwaszkiewicz (47), Sławomir Mrożek (44), Witold Gombrowicz (44), Zbigniew Herbert (43), Ryszard Kapuściński (42) and Jerzy Andrzejewski (40).

High market concentration

The Polish book market is highly concentrated, with 35 publishers making up a market share of 75 percent. In 2014 the five largest publishers (Nowa Era, WSiP, Wolters Kluwer Polska, Pearson Central Europe, Grupa Edukacyjna) had 37 percent of the market. Distribution was dominated by multimedia and book store chains like Matras or Empik with hundreds of points of sale and with 150,000 titles in their portfolio, which led to a mass extinction of small book stores. Over the last five years the numbers have been reduced by 700, down to 1,854, and have therefore shrunk by 30 percent.

Statistically speaking, there are only 0.48 book stores for every 10,000 persons in Poland (United Kingdom: 0.55, The Netherlands: 1.29, France: 1.69).

Online on the rise

The Polish e-commerce market is generally booming and strong with growth rates of 25 percent per year. With online book sales it is still 9 percent. At the moment, one out of every four book passes over the virtual countertop.

E-book sales also grew in 2014 in comparison to 2013 by the margin of 16.5 percent. At around 56 million złoty (ca. 14 million euros), the e-book market makes up between 4 and 5 percent of the overall market. By the end of 2014, there were 37,000 titles available as e-books.

The largest obstacles to growth are widespread piracy and the very high VAT for online products at 23 percent. (Source: <http://dotcomriver.com/report-ecommerce-poland.html>)

Poland's book market at a glance (2014*):

- Sales: 582.1 million euros (-7.5 percent)
- Publishers: ca. 2,000-2,500
- Titles published: 32,480
- New publications: 18,870
- Book sold: 105.8 million copies (-6.5 percent)
- Average book price: 9.74 euros
- Book stores: 1,854

*Source: The Polish Book Institute, The Polish Bookmarket, <http://www.bookinstitute.pl>

For tickets and further information, please visit: www.themarkets2016.com

About the Frankfurt Book Fair

The Frankfurt Book Fair is the international publishing industry's biggest trade fair – with 7,100 exhibitors from more than 100 countries, around 275,000 visitors, over 4,000 events and approximately 10,000 accredited journalists – including 2,000 bloggers - in attendance. It also gathers key players from other media, including the film and games industries. Since 1976, the Book Fair has featured an annual Guest of Honour country, which showcases its book market, literature and culture to attendees in a variety of ways. The Frankfurt Book Fair organises the participation of German publishers at around 20 international book fairs and hosts trade events throughout the year in major international markets. With its Business Club, the Frankfurt Book Fair offers essential services and an ideal setting for the activities of publishers, entrepreneurs, pioneers, experts and visionaries. The Frankfurt Book Fair is a subsidiary of the German Publishers & Booksellers Association. www.book-fair.com

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