



# The Status of Books in Italy and Europe in the Second Year of the Pandemic

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Scuola per Librai Umberto ed Elisabetta Mauri

# The European book: world leadership

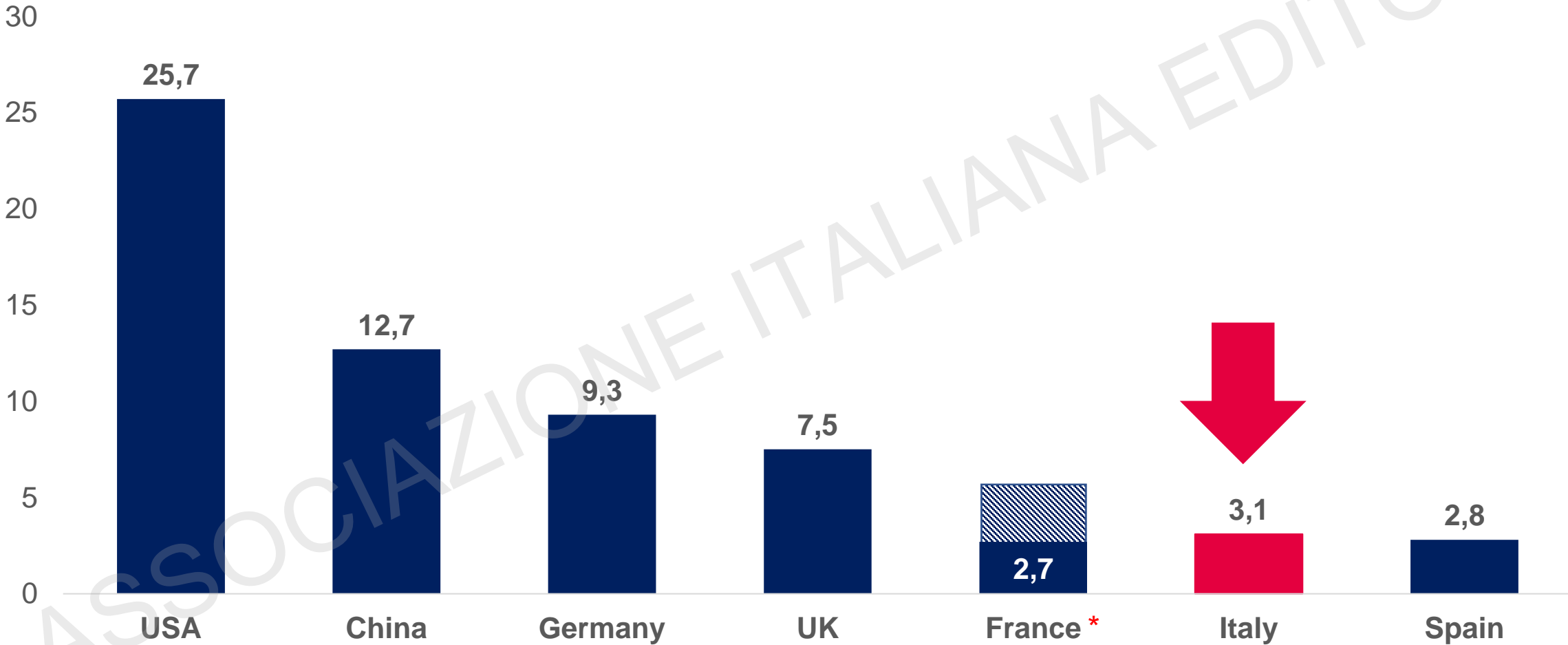
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**The European publishing market is worth €33 billion: 60% of the global market and 6 of the 10 major international publishing groups are European. 4 of the *Big 5* in the USA are also European**

Position	Publisher (group or division)	Country	Revenues (€M)
1	RELX Group (Reed Elsevier)	UK/Netherlands/USA	€4,797
2	Thomson Reuters	USA	€4,178
3	Bertelsmann	Germany	€4,103
4	Pearson	UK	€3,763
5	Wolters Kluwer	Holland	€3,529
6	Hachette Livre	France	€2,375
7	Springer Nature	Germany	€1,630
8	Wiley	USA	€1,491
9	Phoenix Publishing and Media Company	China	€1,357
10	HarperCollins	USA	€1,356

# Italian publishing ranks sixth in the world and fourth in Europe

Value in billions of euros at cover price of the entire publishing sector in 2020: trade, educational, professional, digital, export

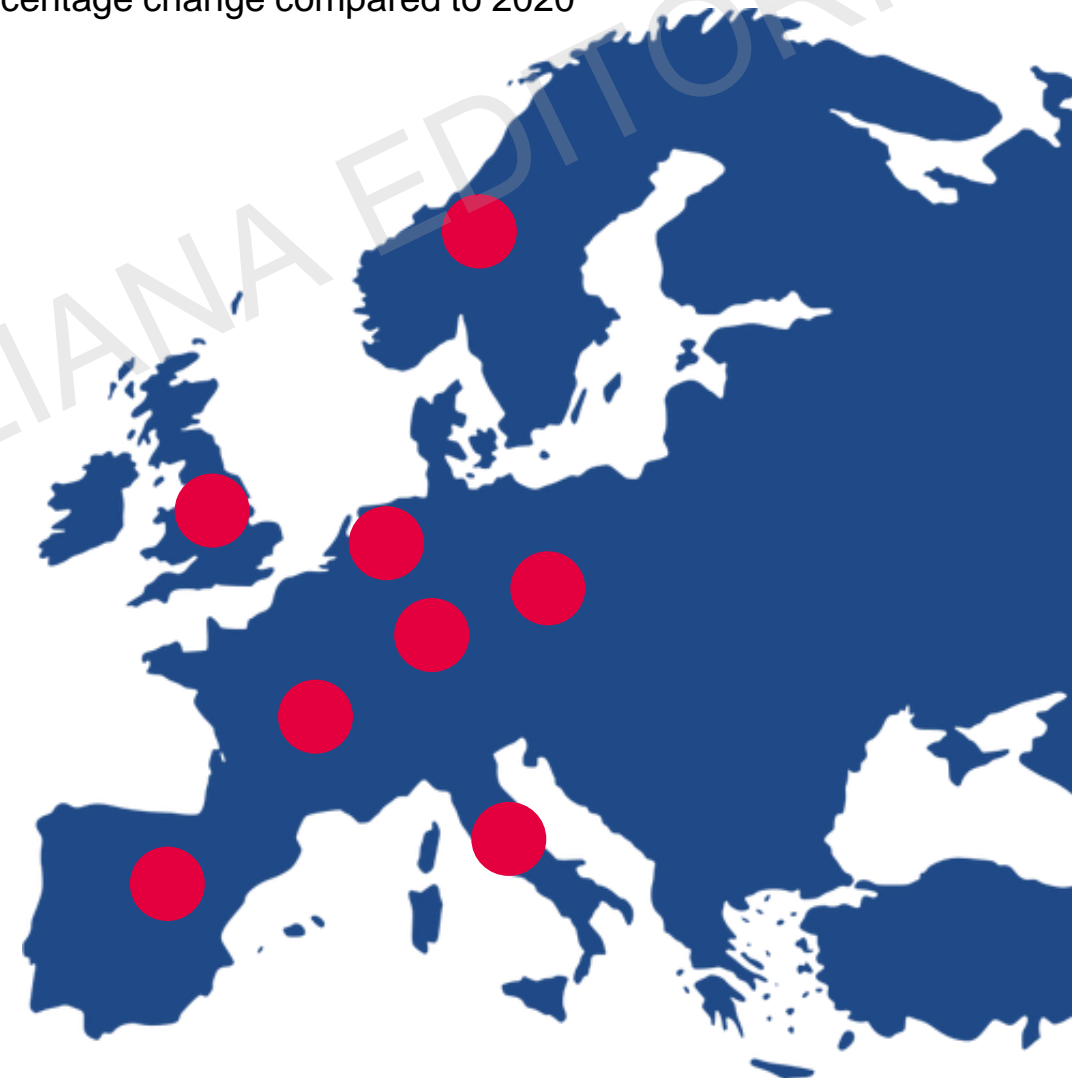


\* The French figure refers to the turnover recorded in the financial statements by the publishers. Source: Syndicat national de l'édition

# How the trade market fared in 2021. Italy compared to certain European countries

Trade market value excluding e-books and audio books. Percentage change compared to 2020

<b>France</b>	<b>+20%</b>	<b>Netherlands</b>	<b>+8%</b>
<b>Spain*</b>	<b>+20%</b>	<b>Austria</b>	<b>+4%</b>
<b>Norway</b>	<b>+9%</b>	<b>Germany</b>	<b>+3%</b>
<b>Poland</b>	<b>+9%</b>	<b>UK</b>	<b>+3%</b>
<b>Italy</b> <b>+16%</b>			

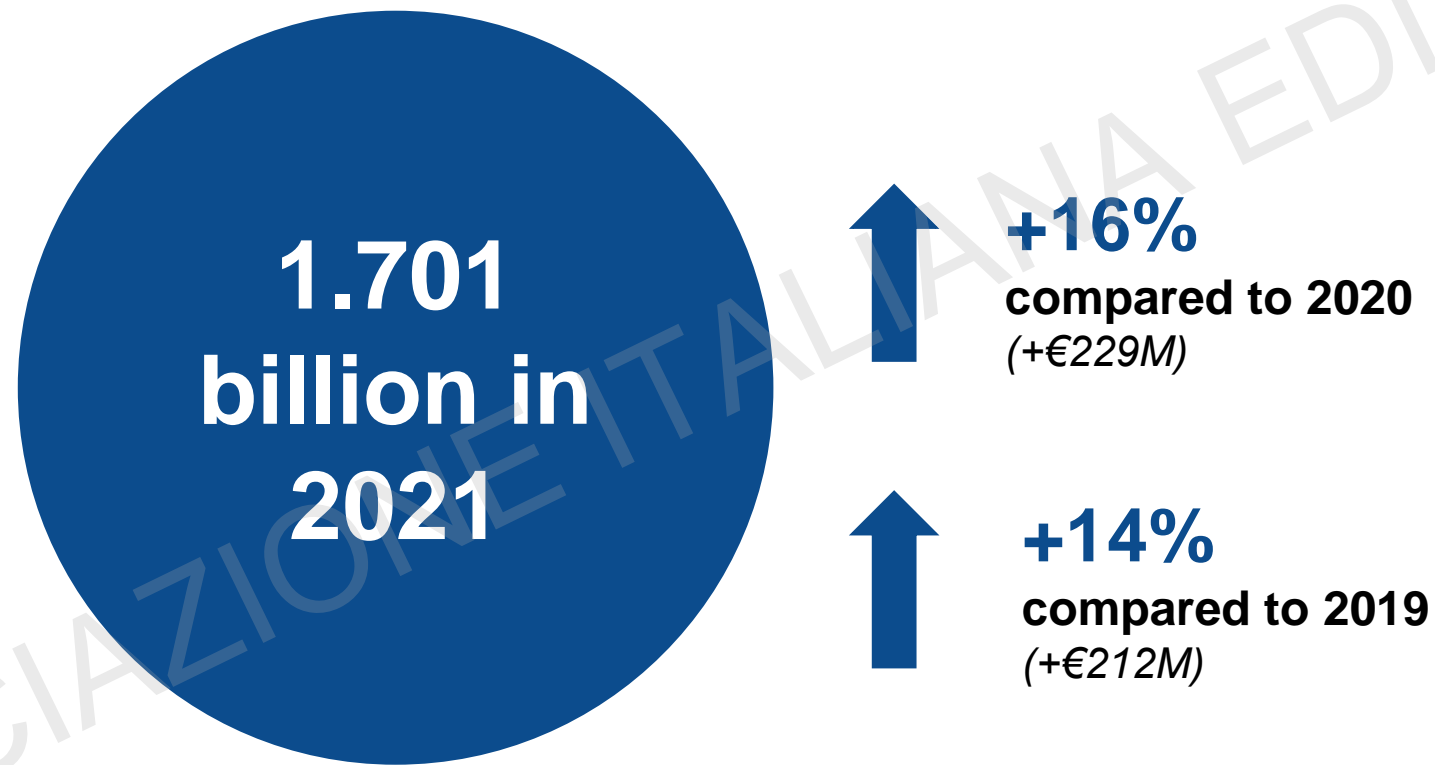


\* Provisional figure as of December 2021

# How the trade market fared in Italy in 2021

# How did the sales of print books fare in the trade channels?

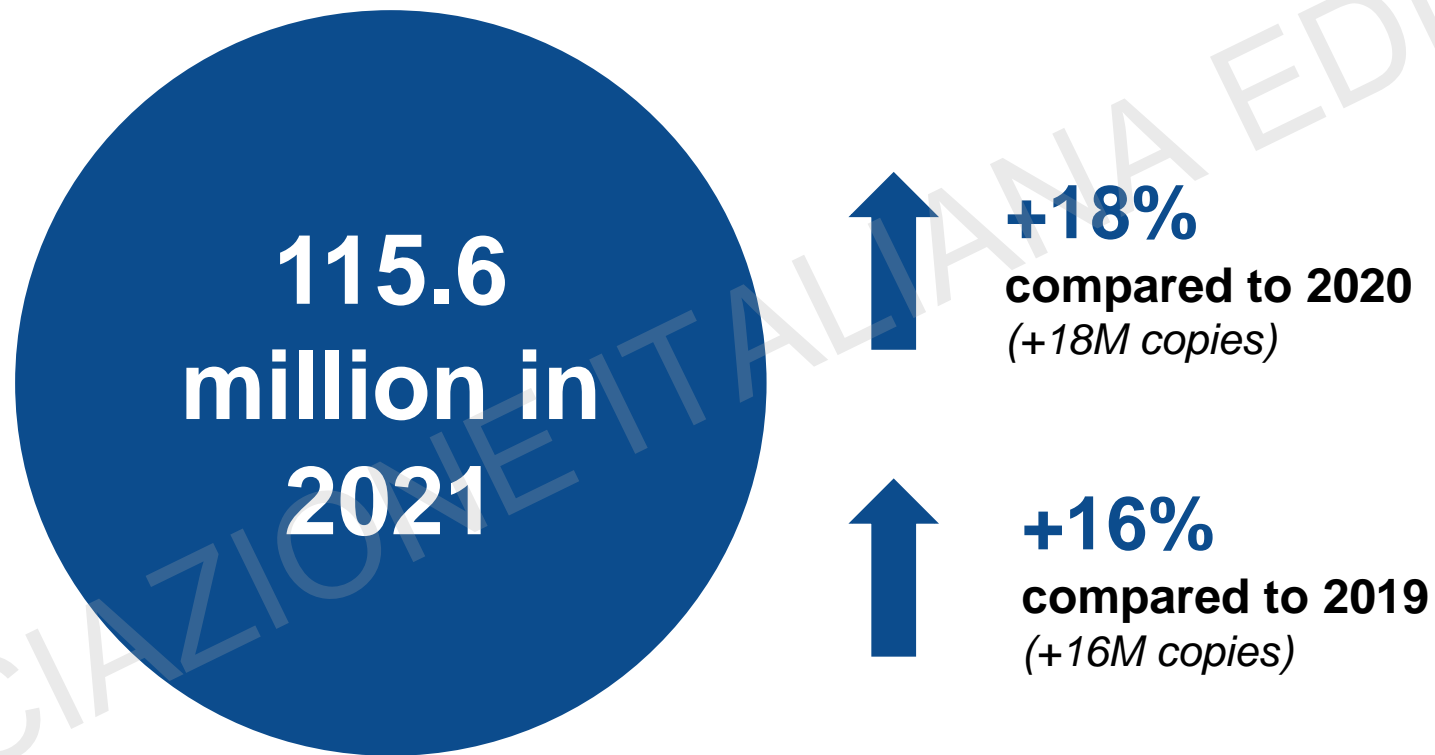
Value in billions of euros at cover price and percentage changes compared to previous years



Value at cover price of the trade market in the 52 weeks of 2021.  
This refers to the sales of print books in physical bookshops, online and through major retail chains.  
Educational publishing is excluded.

# Copies purchased grow even more

Values in millions of copies and percentage changes compared to previous years

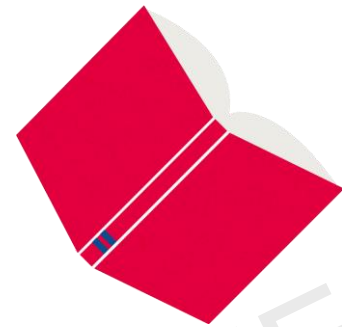


Copies sold on the trade market in the 52 weeks of 2021.  
This refers to the sales of print books in physical bookshops, online and through major retail chains.  
Educational publishing is excluded.



# Cover prices of books sold are falling

Values in euros and percentage changes compared to previous years



**€14.72**

2021 price



**-2.4%**  
compared to 2020  
(€15.08)

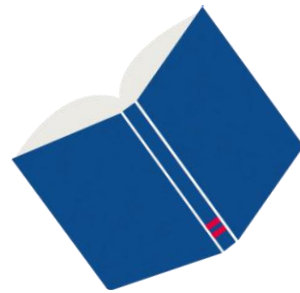


**-1.7%**  
compared to 2019  
(€14.97)

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# The number of books published is growing again, surpassing 2019 figures

Number of new print titles published and % changes compared to previous years



**85,551**  
new releases published  
in 2021\*

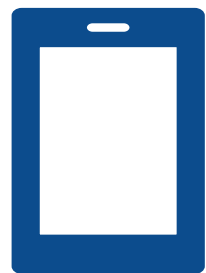
**+22.9%**  
compared to 2020  
(69,608)

**+16.0%**  
compared to 2019  
(73,745)

\* Provisional figure

## On the other hand, the number of e-books published is down

Number of new e-books published and percentage changes compared to previous years



**49,313**  
new releases published  
in 2021\*



**-5.6%**

compared to 2020  
(52,237)

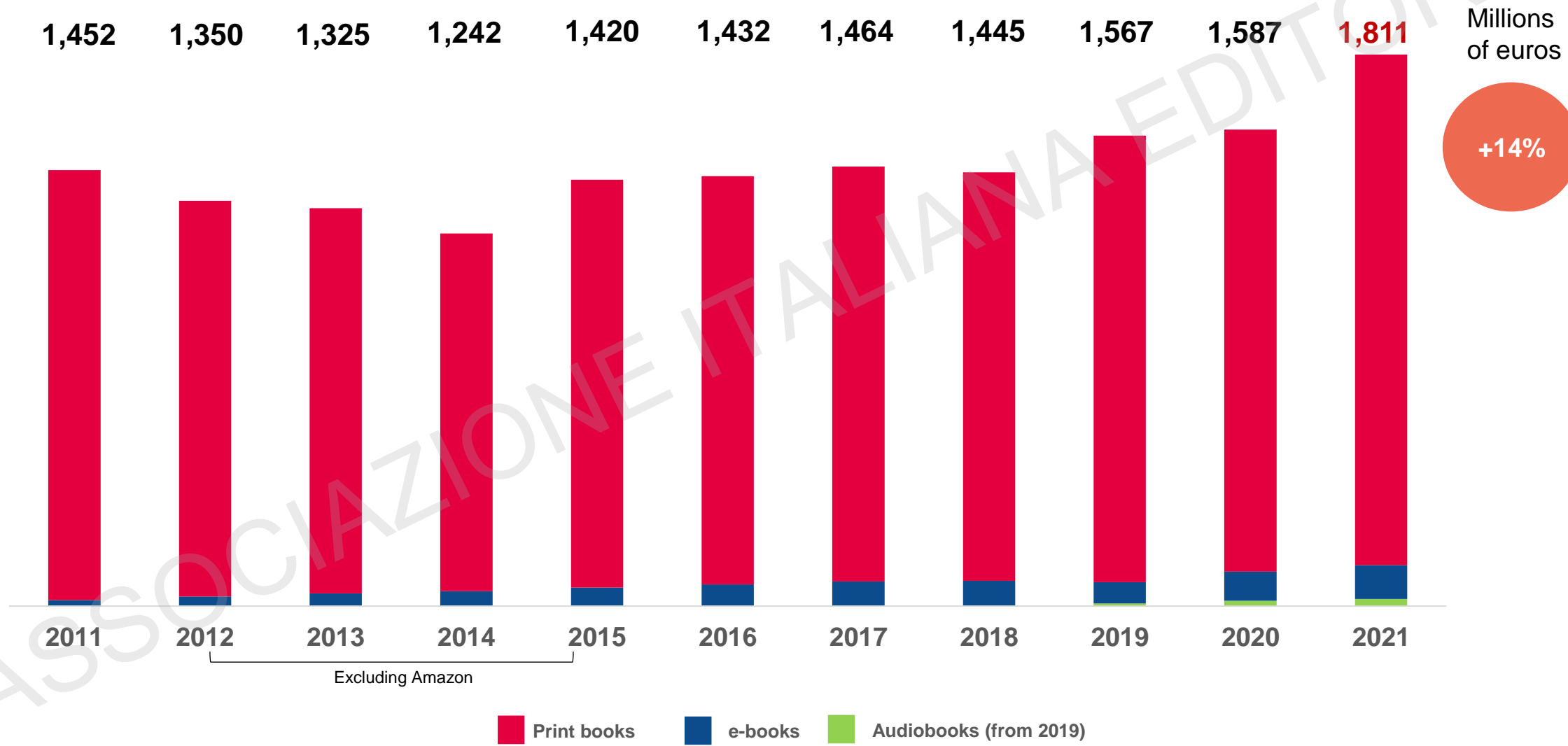


**+1.1%**

compared to 2019  
(48,763)

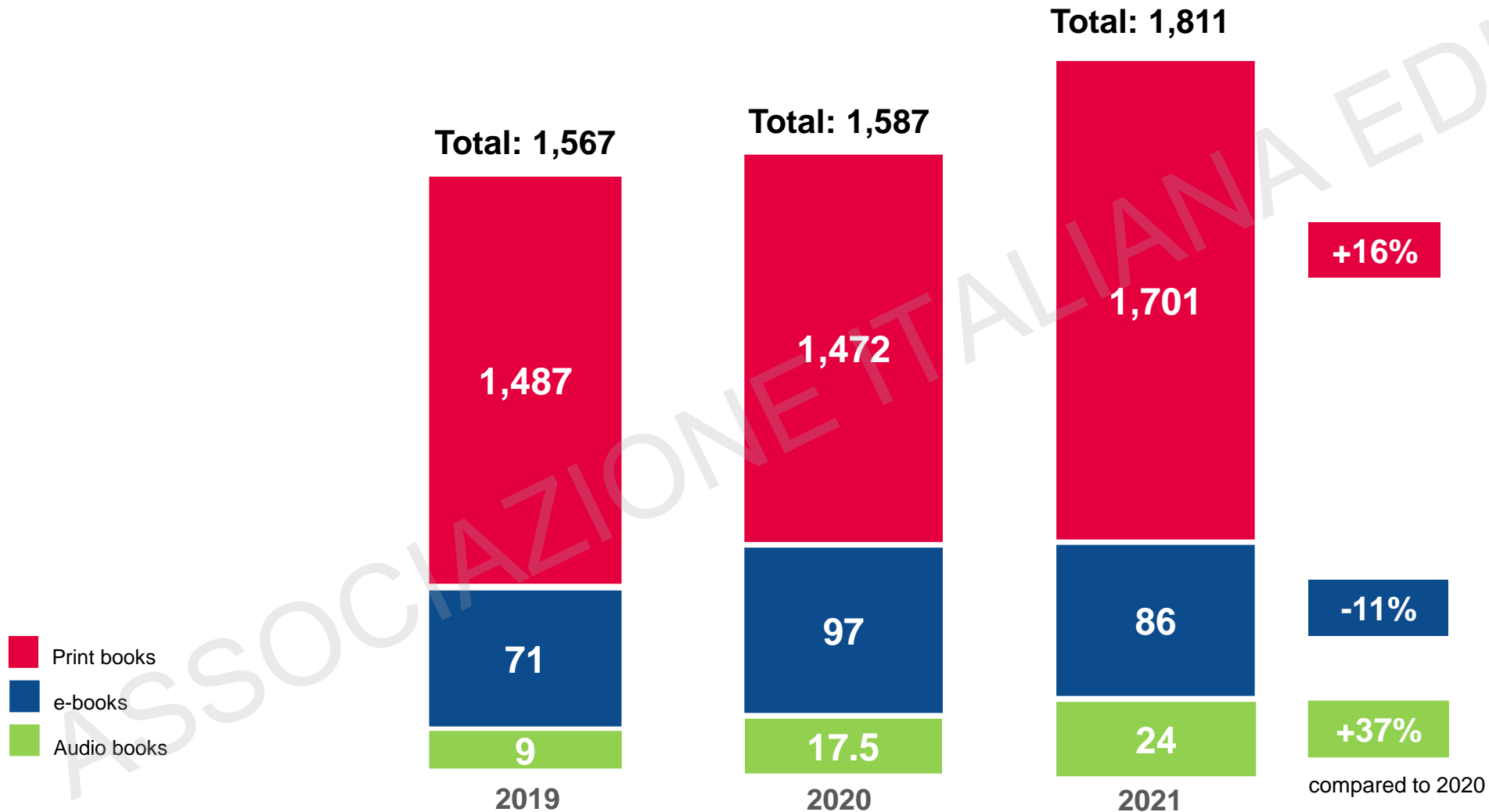
\* Provisional figure

# Trend in the value of trade books: print, e-books and audio books from 2011 to today



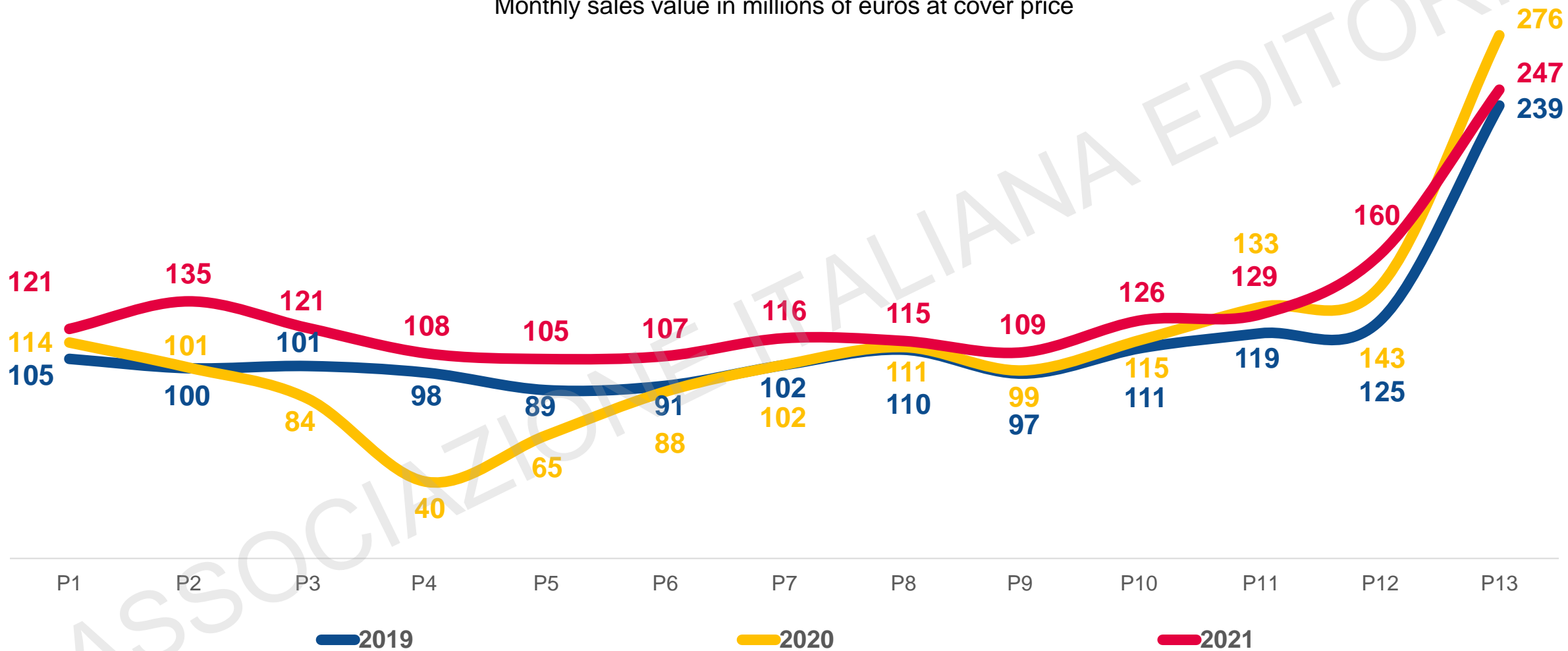
# Trend in value from 2019 to 2021

Values in millions of euros and % increase over the previous year



# The growth of the print book market was spread over all periods of the year with the usual peak at Christmas

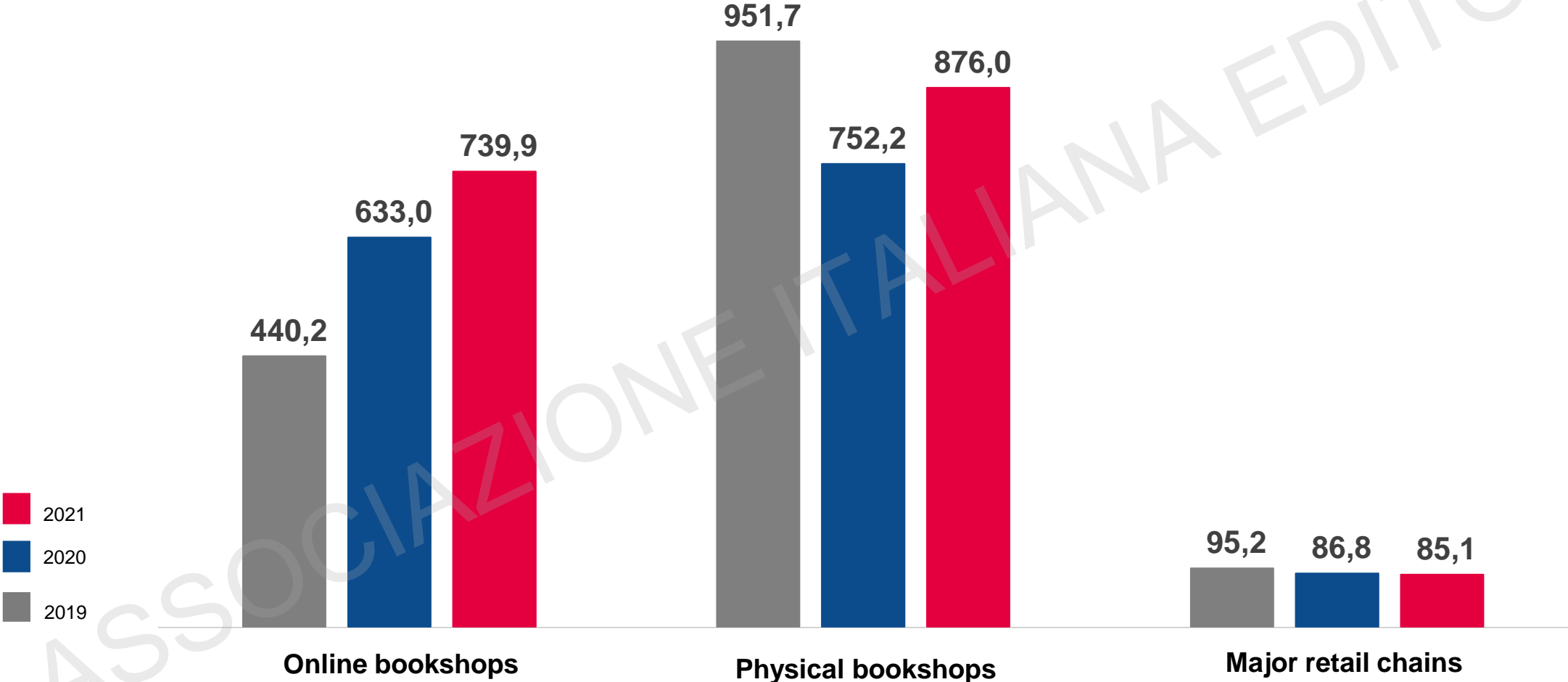
Monthly sales value in millions of euros at cover price



The calendar year is divided into *periods* (P) of four weeks each

# The trend of the individual channels: the constant growth of online sales, the recovery of physical bookshops

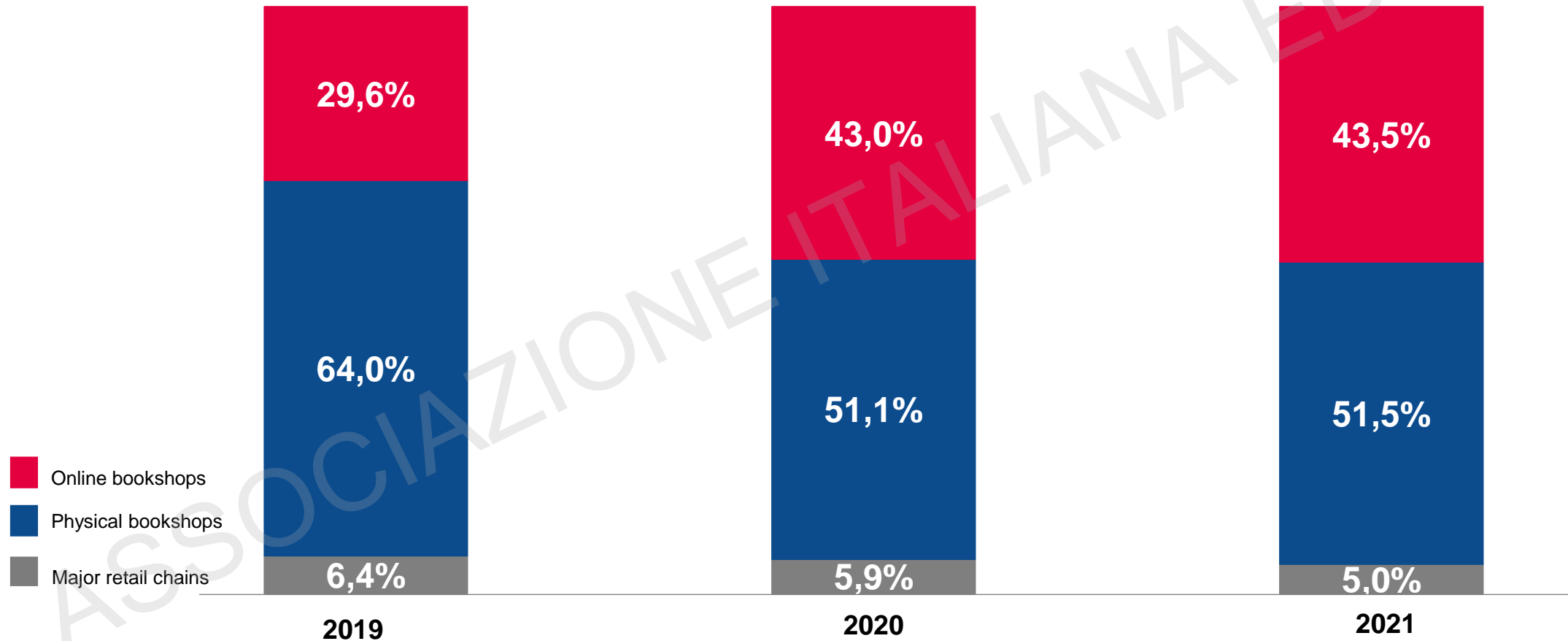
Sales value at cover price in millions of euros



# Market shares of sales channels.

## Physical and online bookshops remain stable at 2020 values

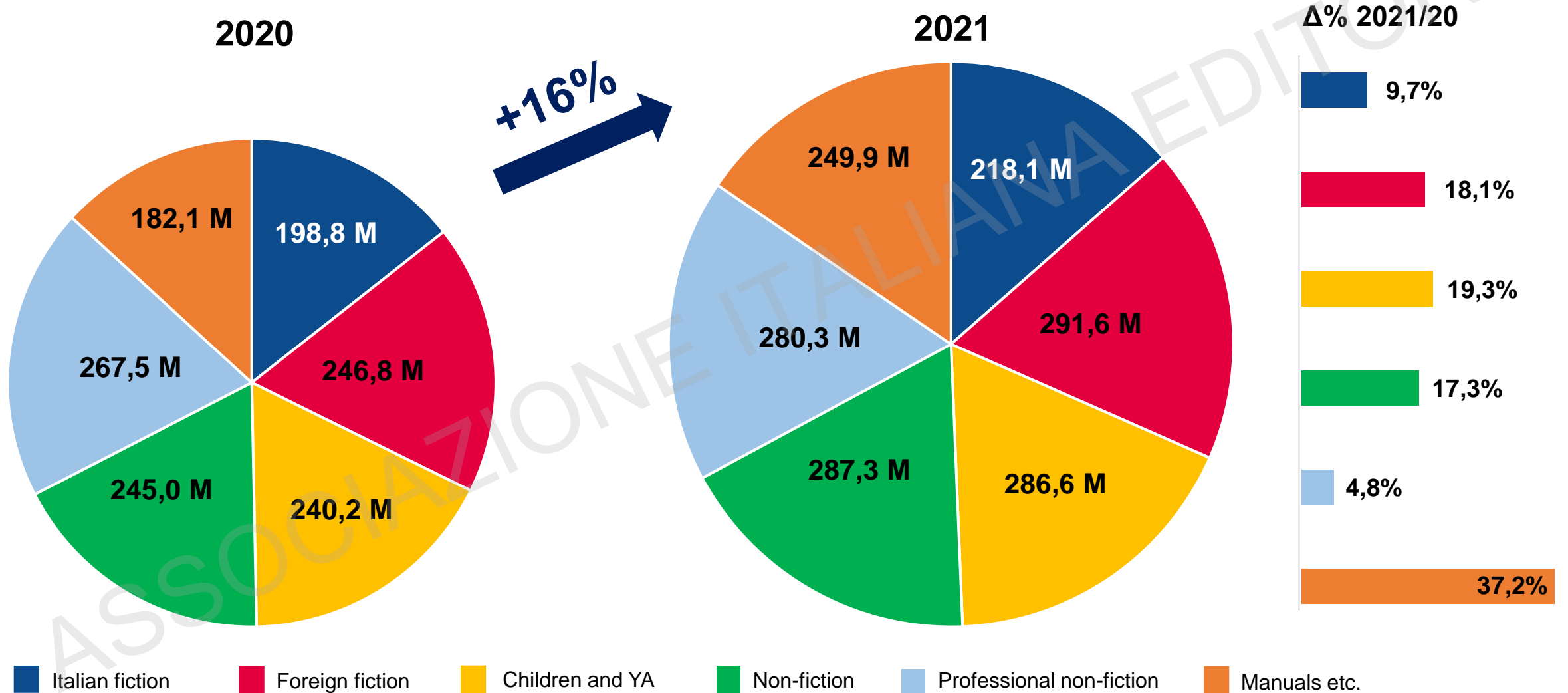
Market share as a percentage based on sales at cover price





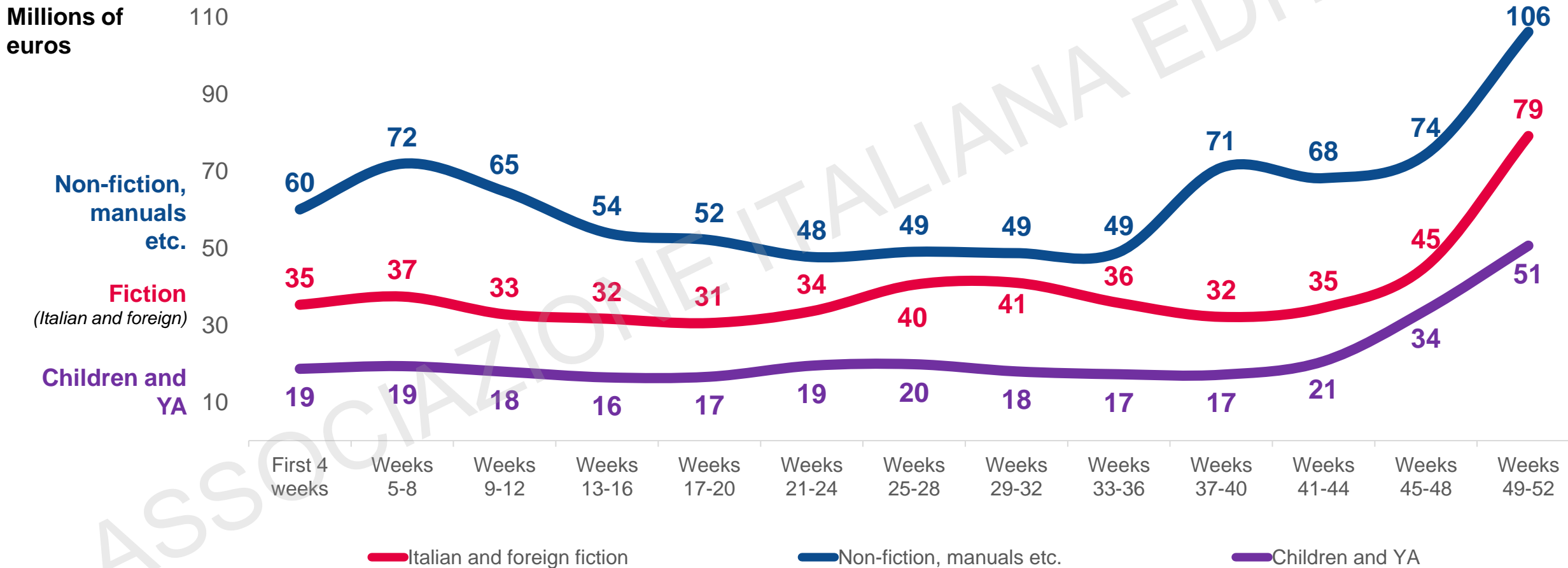
# The growth of the market involved all macro-genres

Trend in value of market shares by macro-genres, and growth in % compared to 2020



# The trend of macro-genres: the Christmas effect, the start of university lessons, books for the holidays, reading after school ends

Sales trend of the cover price in the various periods of the year; values in millions of euros



# The Top 10 of 2021: Italian and foreign authors, comics, non-fiction, catalogue, but also new releases that came out in the last weeks of the year



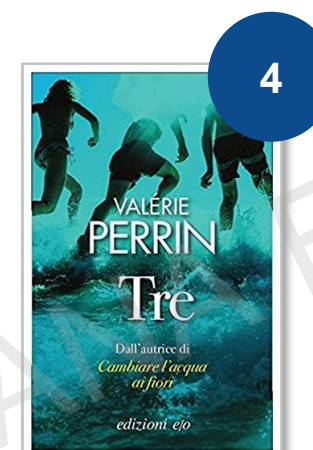
**1**  
*L'inverno dei Leoni*,  
S. Auci, Nord  
(May 2021)



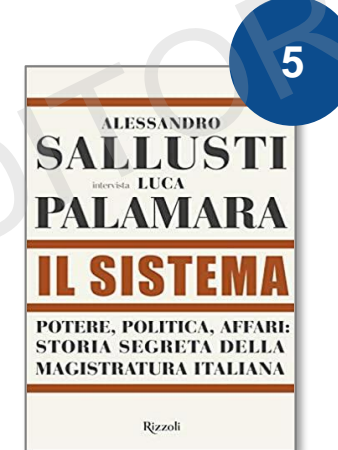
**2**  
*Cambiare l'acqua ai fiori*, V. Perrin, E/O  
(July 2019)



**3**  
*La canzone di Achille*,  
M. Miller, Marsilio  
(January 2019)



**4**  
*Tre*, V. Perrin,  
E/O  
(June 2021)



**5**  
*Il sistema*, A. Sallusti,  
L. Palamara, Rizzoli  
(January 2021)



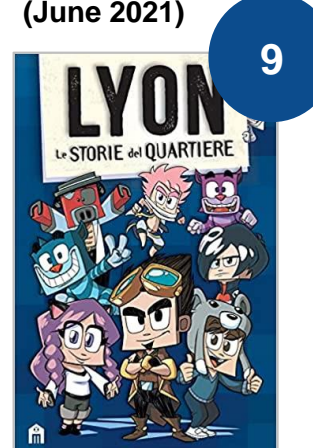
**6**  
*Finché il caffè è caldo*,  
T. Kawaguchi, Garzanti  
(March 2020)



**7**  
*Per niente al mondo*,  
K. Follett, Mondadori  
(November 2021)



**8**  
*La disciplina di Penelope*,  
G. Carofiglio, Mondadori  
(January 2021)



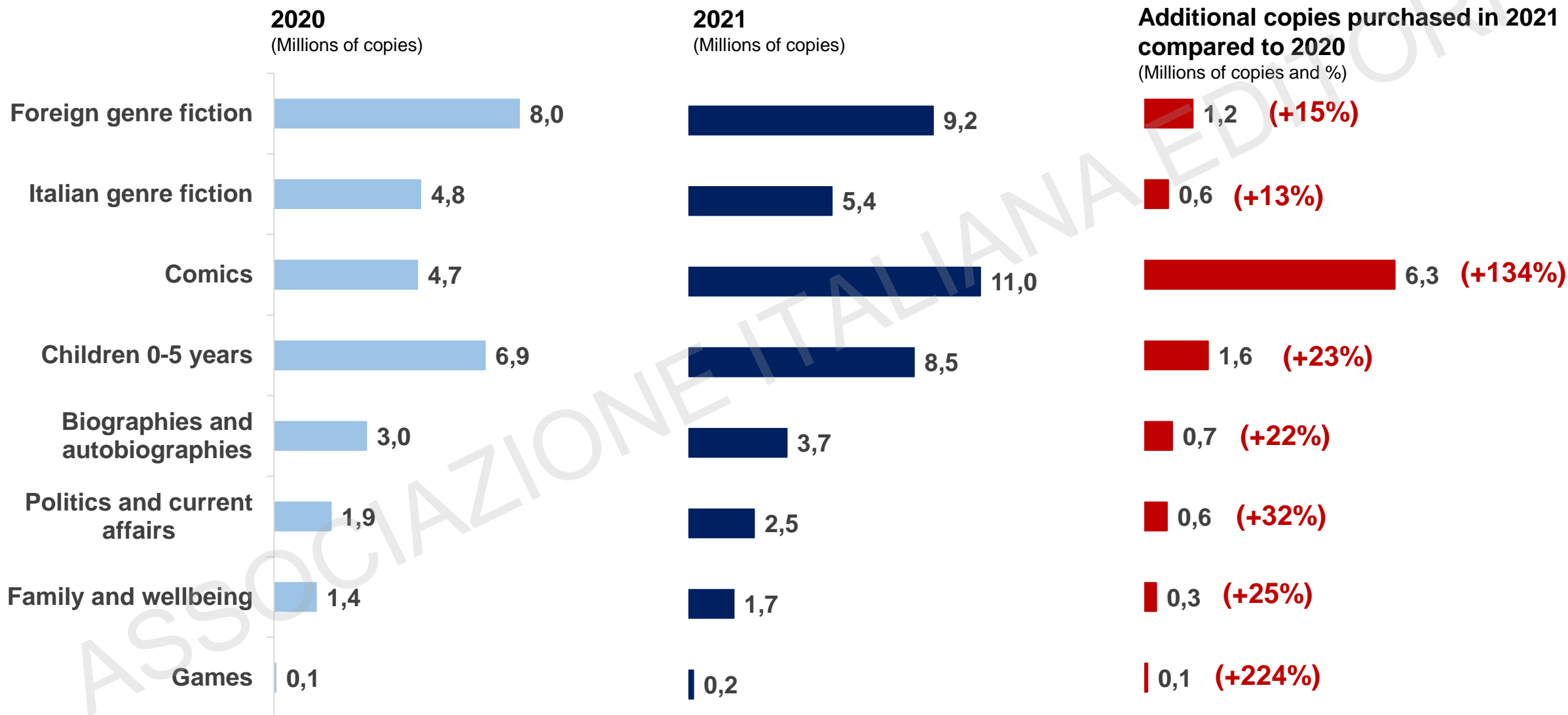
**9**  
*Le storie del quartiere*,  
G. Lyon, Magazzini  
Salani (February 2021)



**10**  
*Una vita nuova*,  
F. Voio, Mondadori  
(November 2021)

# The genres that Italians purchased the most in 2021

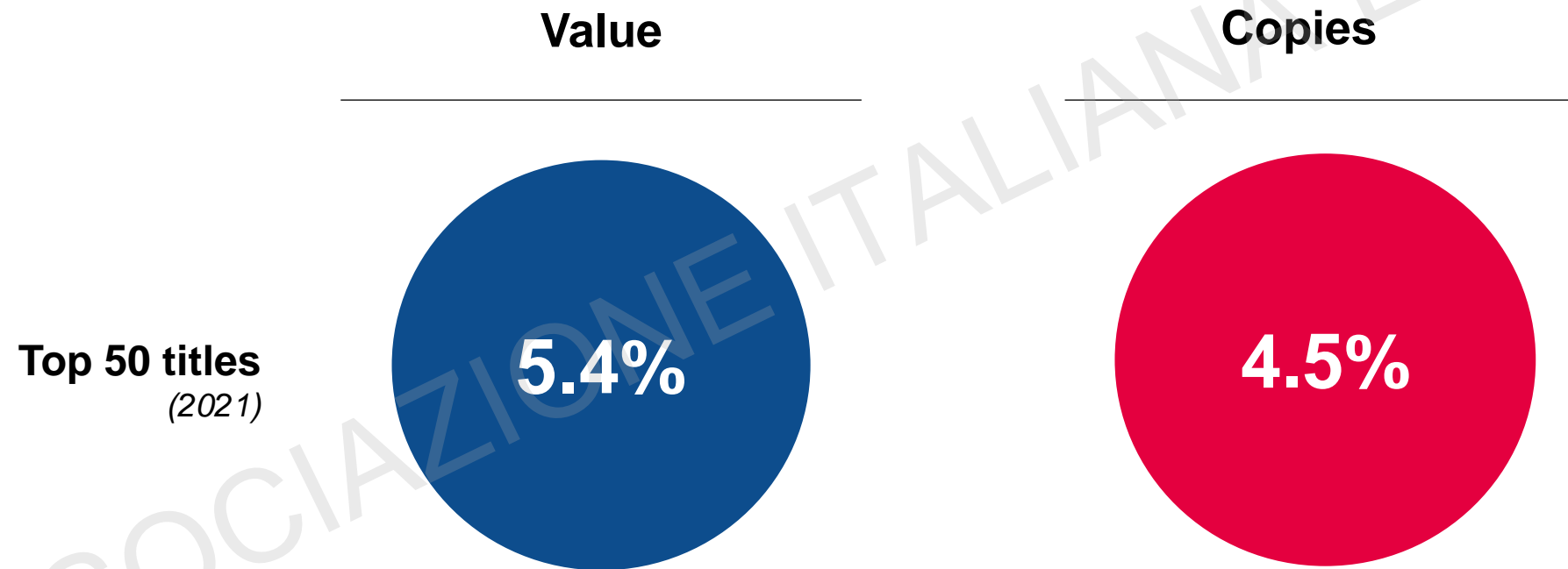
Number of copies purchased and percentage increase compared to 2020



# The whole market moved.

## The Top 50 of 2021 represent 5% of the value and 4% of copies

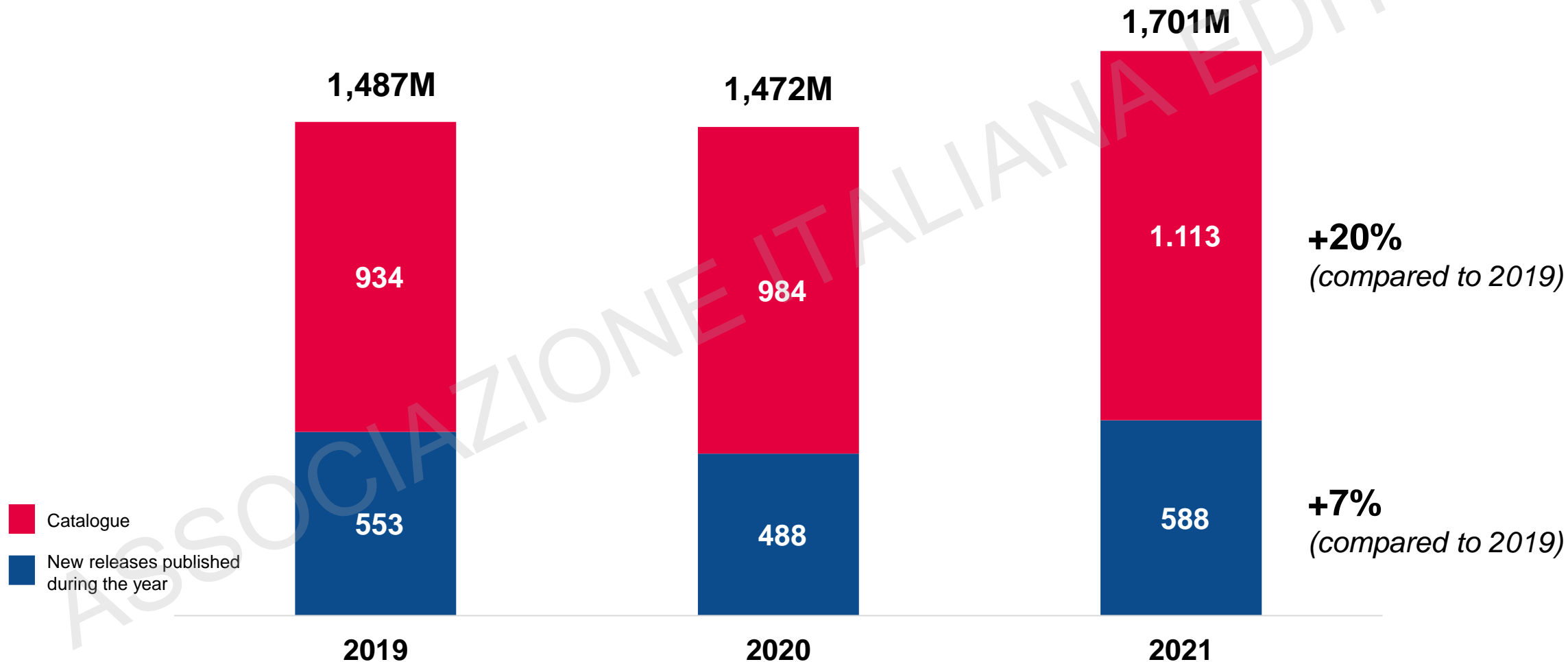
Cumulative value of sales by value and by copies as a percentage



Top 50 titles  
(2021)

# The market grows with new releases but even more with the catalogue

Composition of the sales value divided into new releases in the reference year and those published in previous years (catalogue)



## Two very positive years behind us. What awaits us now?

- Support measures (18app, library funding) have become structural
- We await the new law on books (support for innovation and internationalisation)
- Copyright Directive
- Impact of the pandemic on growth, consumption and logistics
- Availability and price of paper
- Continuing difficulties for tourism and art publishers
- Uncertainties about literary fairs and festivals
- Piracy

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