

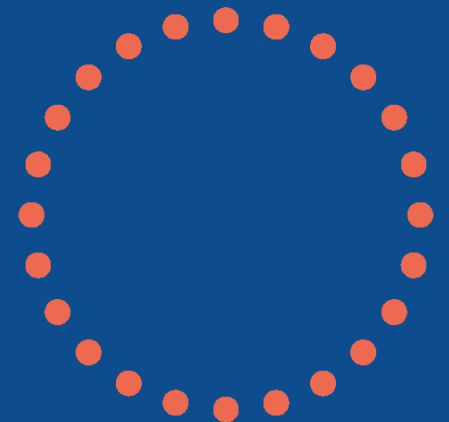


Associazione
Italiana
Editori



Presentation of the Report on the state of publishing in Italy 2023

October 18, 2023
Frankfurter Buchmesse



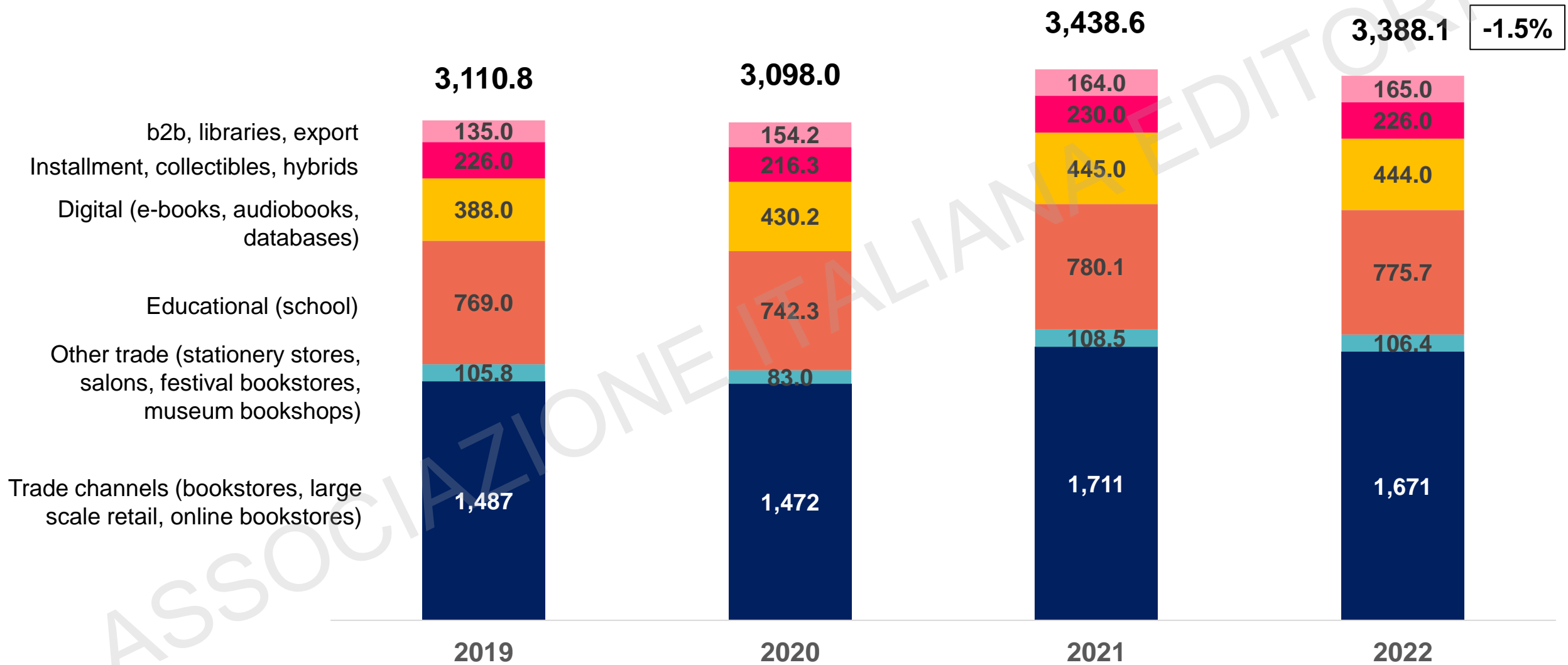
How did 2022 go?
The overall market

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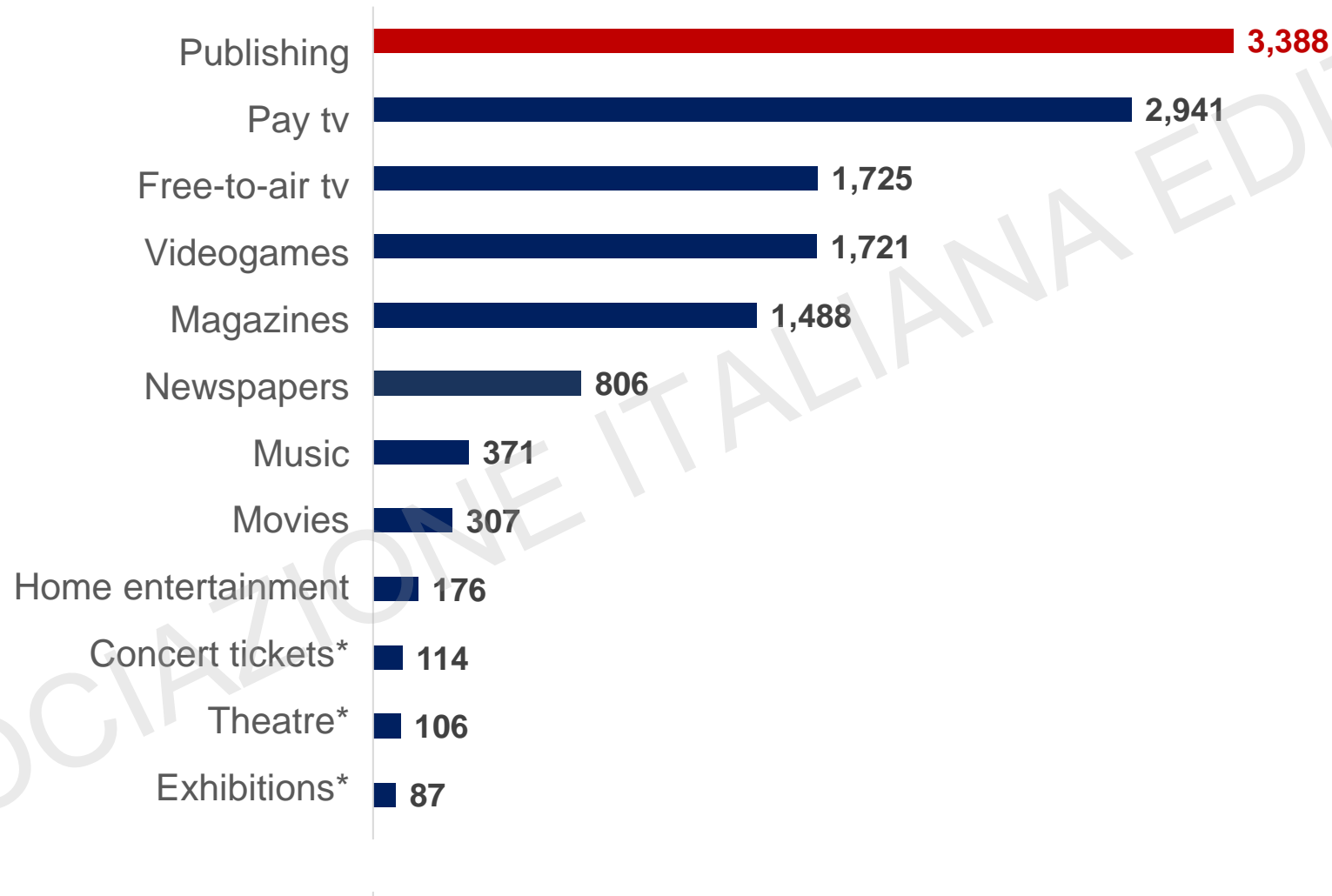
An adjustment year that touched all channels to varying degrees

Composition of the total book market by sales price. Values in millions of euros



Publishing is confirmed as the first Italian cultural industry

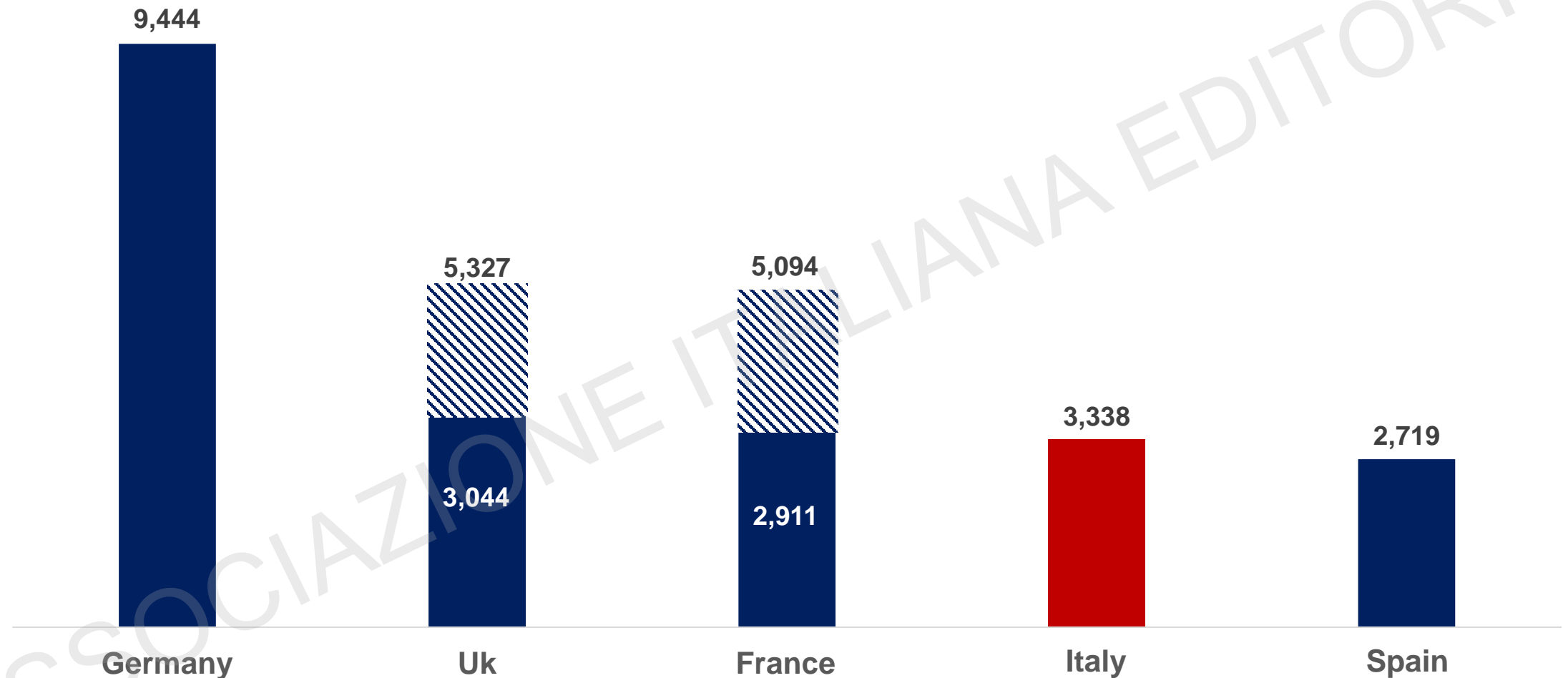
Value of major content industries at constant scope. Values in millions of euros



* Value still refers to 2021 as SIAE has not yet released 2022 data

In 2022, Italian publishing continues to be the fourth largest in Europe

Sales values in the domestic market, excluding book exports*. Values in millions of euros

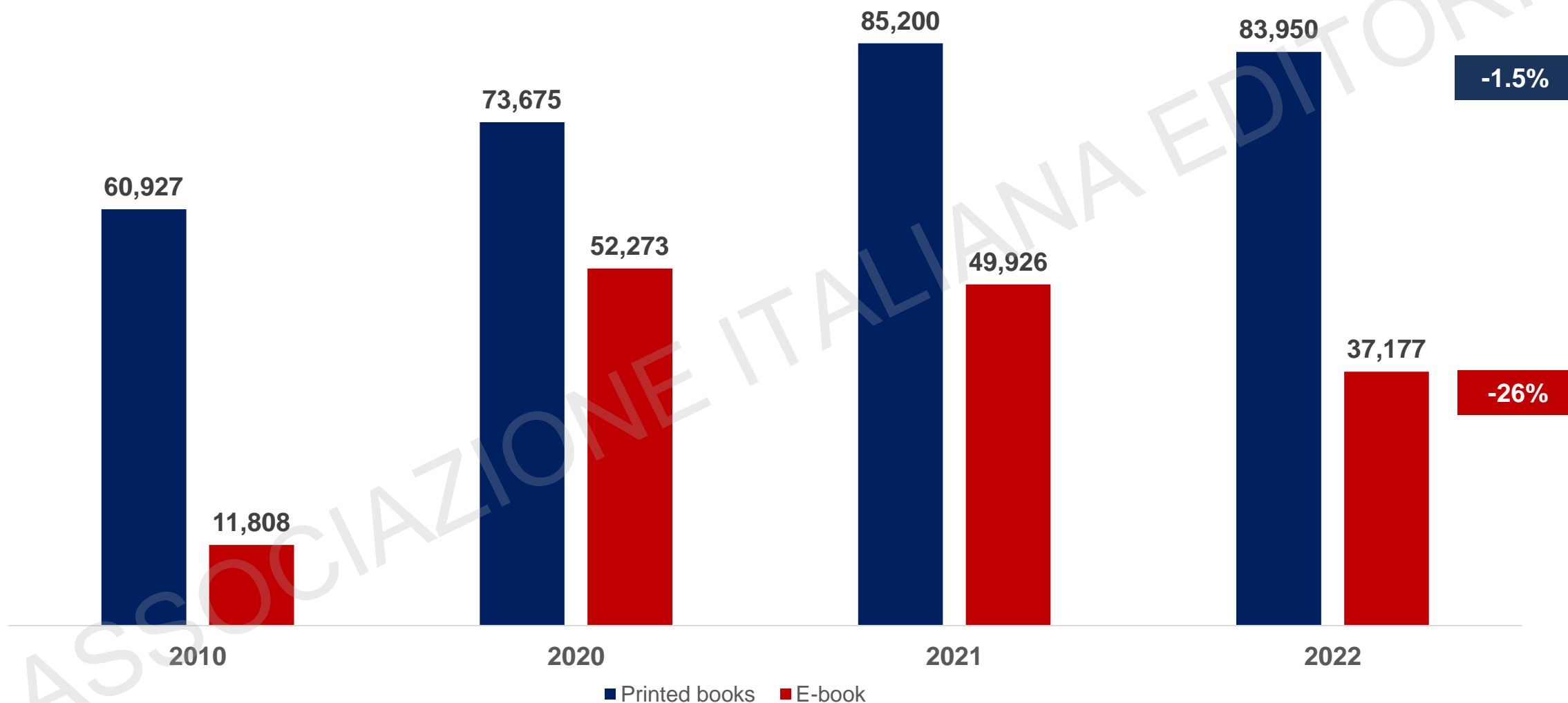


*We have not considered exports because Italy does not have a significant "Italian-speaking" market outside its borders, unlike other countries.

Publishers in France and the United Kingdom express their market in terms of net sales realized by publishers, not in terms of audience spending. We have estimated their values to allow comparison.

A settling year in the number of books published, Down in e-books (but the way titles are counted has changed)*

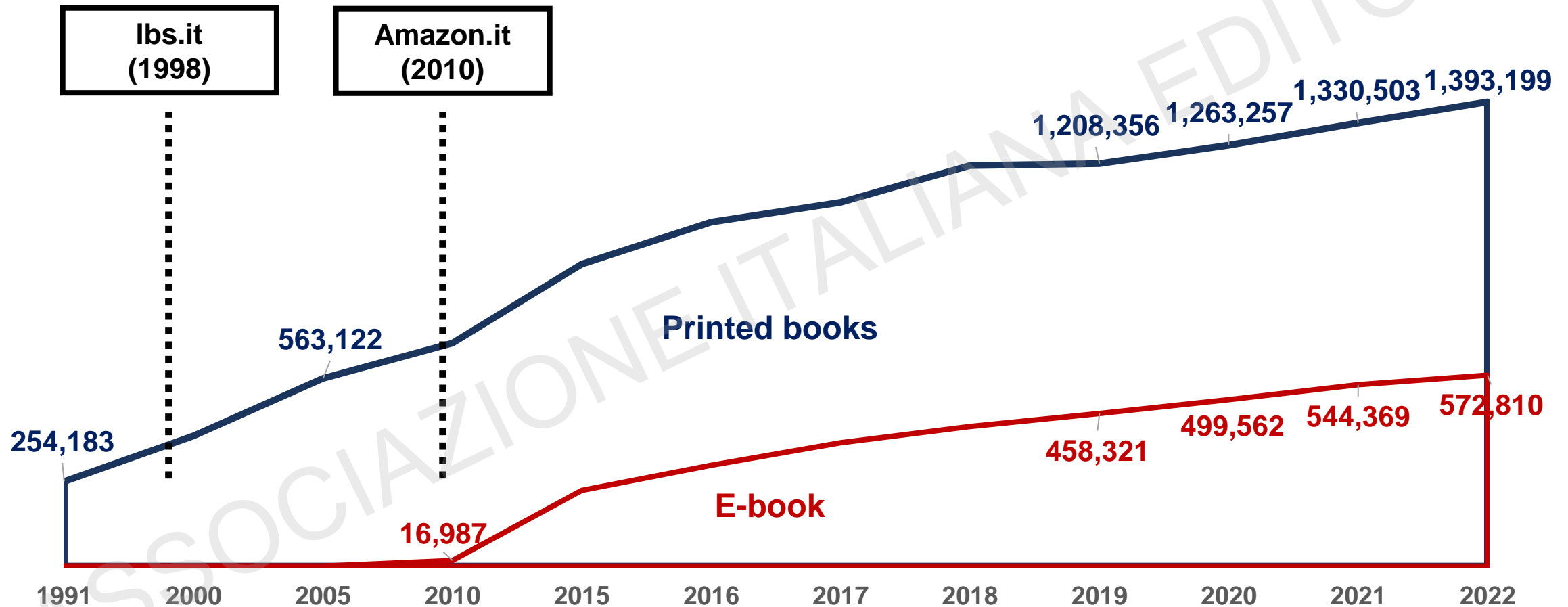
Values in number of titles and percentage change from previous year



*The catalog no longer considers, for some publishing companies, "multi-format" titles (multiple e-book products with different ISBN codes): of these works, only information about the format indicated as the main one by the company is now uploaded to the system.

An ever-larger catalog: lengthening the life cycle of books

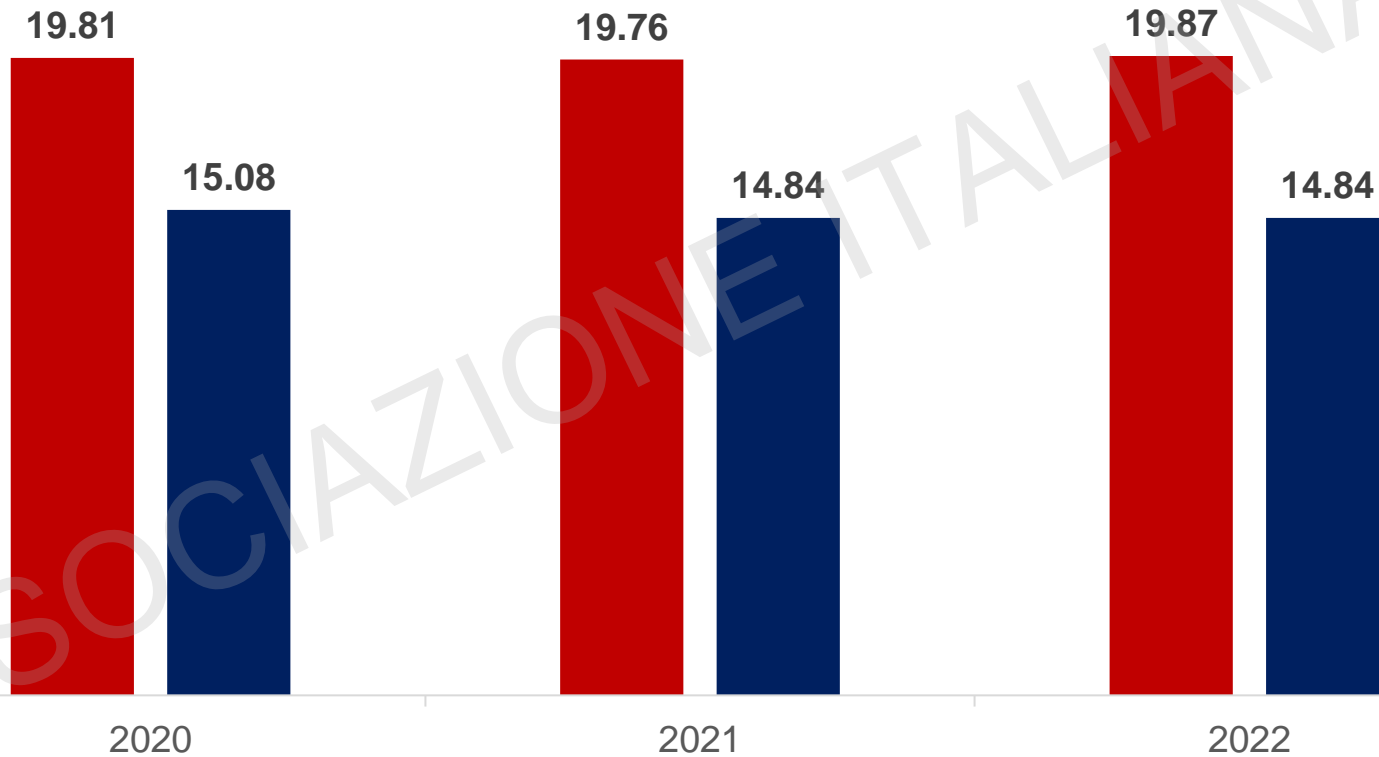
Values in number of available titles



Book prices stable compared with inflation above 8%

Average cover price of newly published titles and cover price of sales

- Average cover price of newly published titles (unweighted figure on sales)
- Average cover price of sales (sales-weighted figure)



+ 8.1%

Average annual inflation in 2022

How did 2022 go?
An insight into the trade market

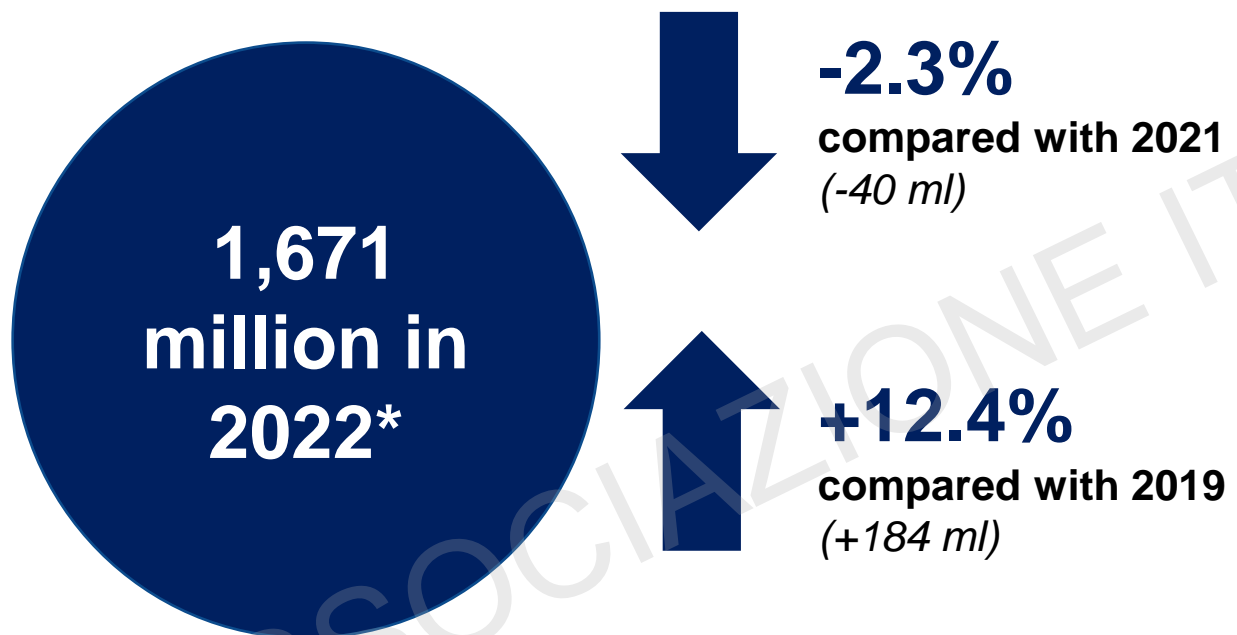
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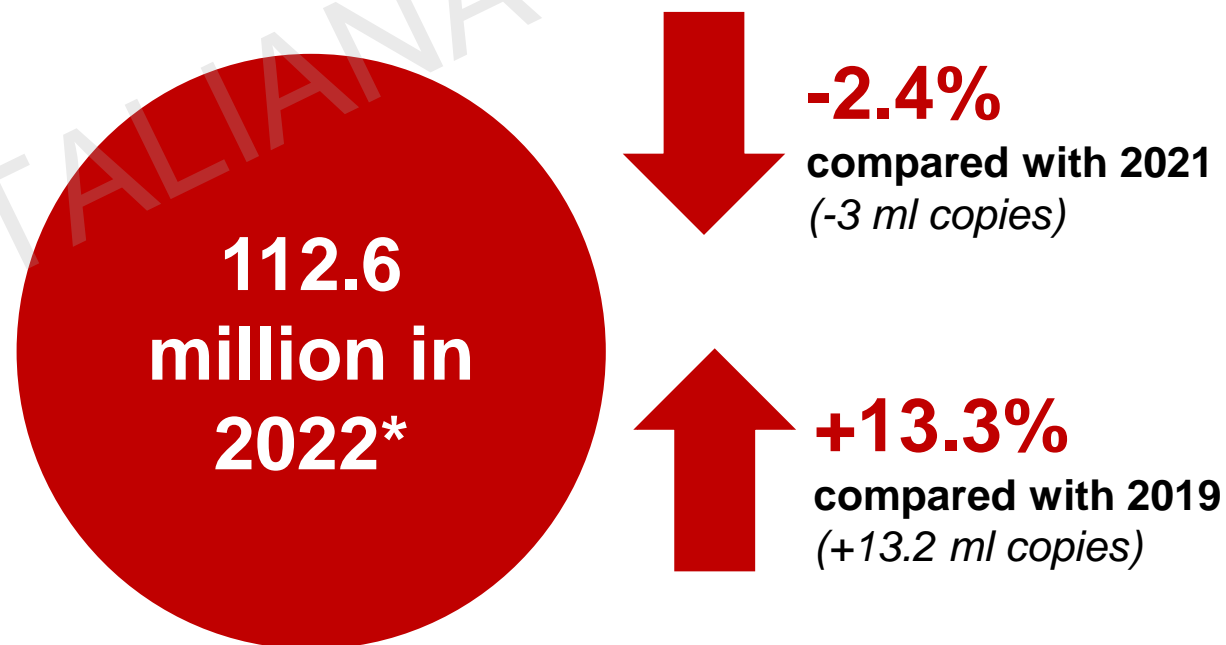
How did sales in trade channels fare in 2022

Value in millions at cover price and number of copies; percentage changes from previous years

Value trend*



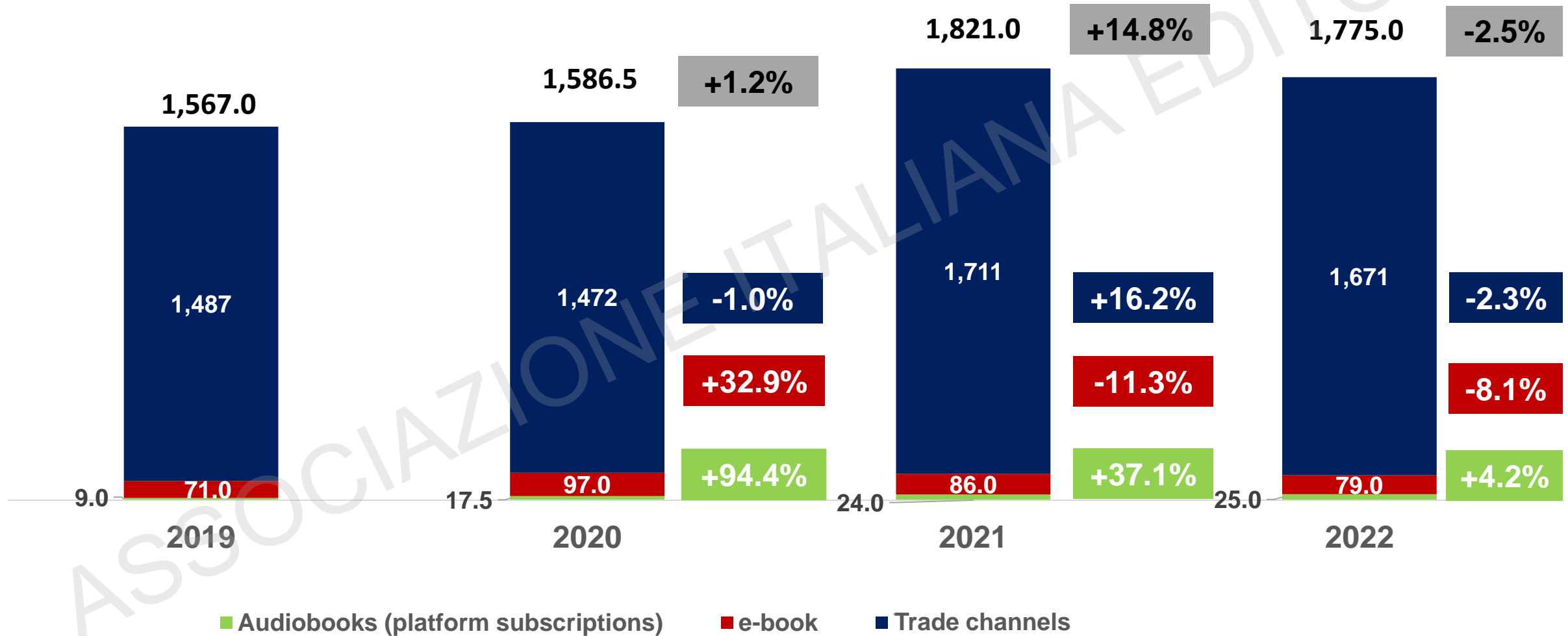
Trend in copies



* At cover price, 52 weeks

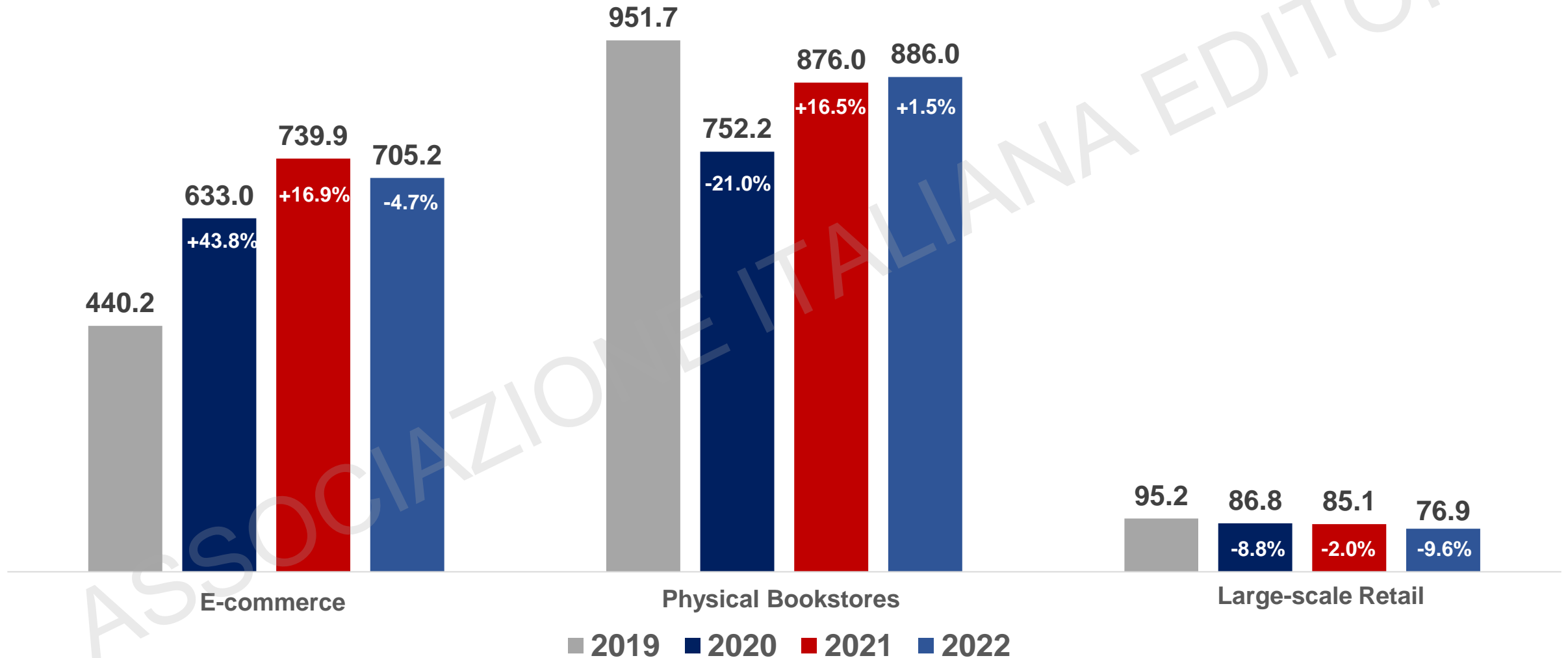
In digital audiobook grows, e-book declines

Sales of trade, print and digital books. Value in millions of euros - Percentage changes from previous years



The performance of individual sale channels in 2022: Still growing physical bookstores, settling online

Sales values at cover price in mln and %.



Reading in Italy

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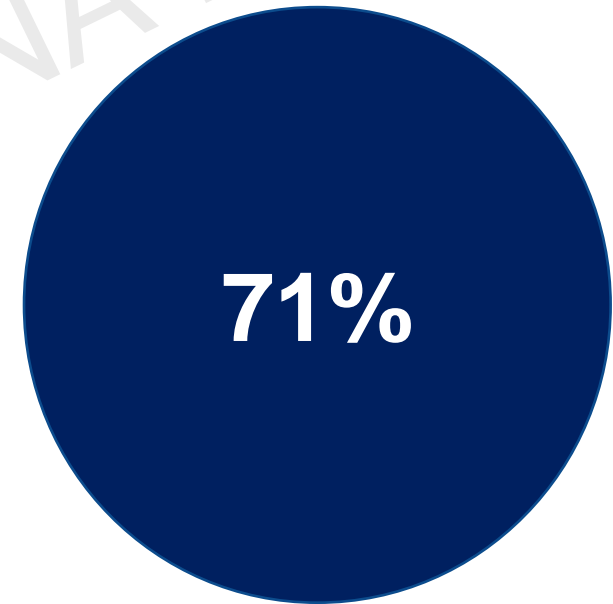


Readership in Italy: the AIE survey based on Pepe Research data

Percentage of total population in the reference universe in 2022

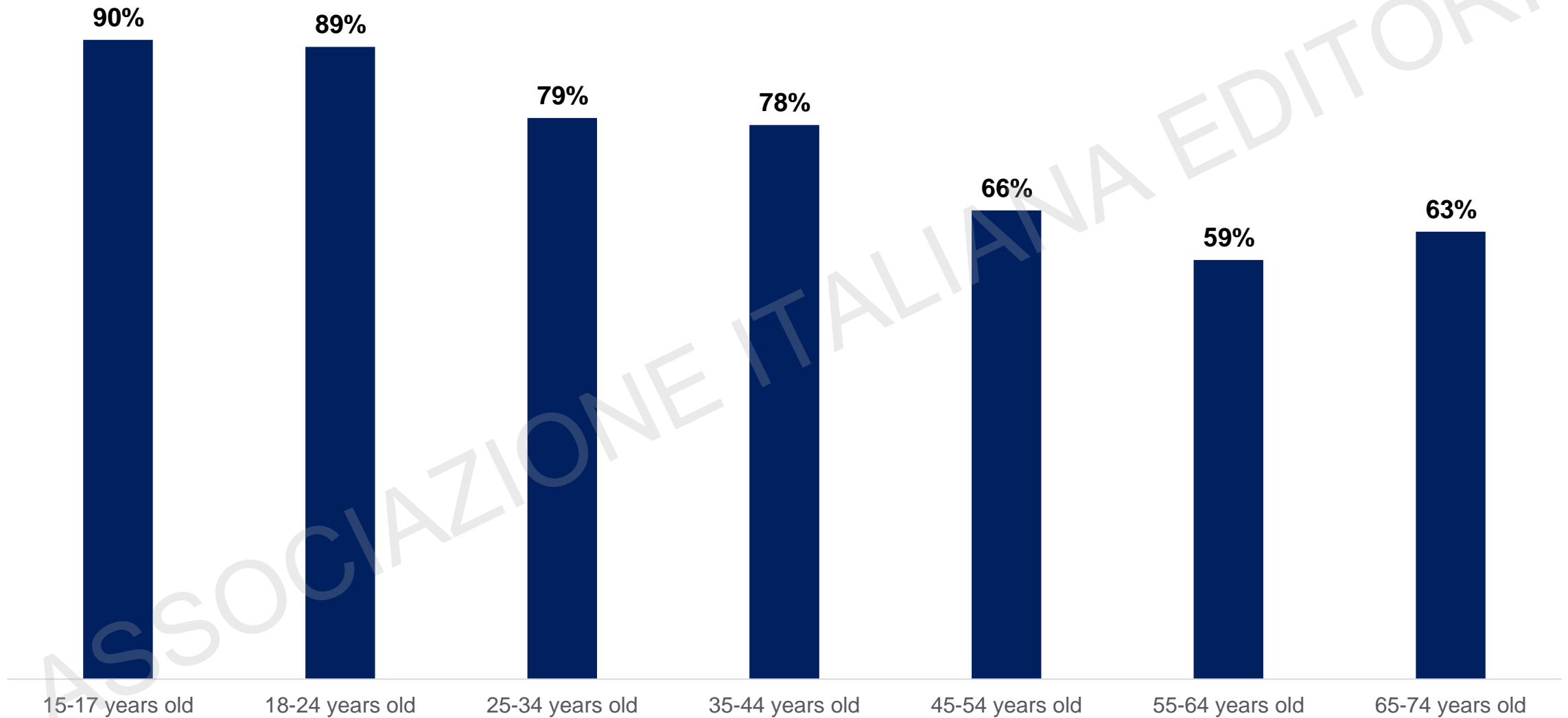
Readers between the
ages of 15 and 74

Thinking about the past 12 months, have you happened to read, even in part, a book of any genre, not only fiction (such as a novel, detective story, comic book, fantasy...) but also an essay, a manual, a travel or cooking guide, etc., on paper or in digital format such as an e-book, or listening to an audiobook?



Reading decreases as age increases

Percentage of total population in the reference universe



Italian publishing abroad

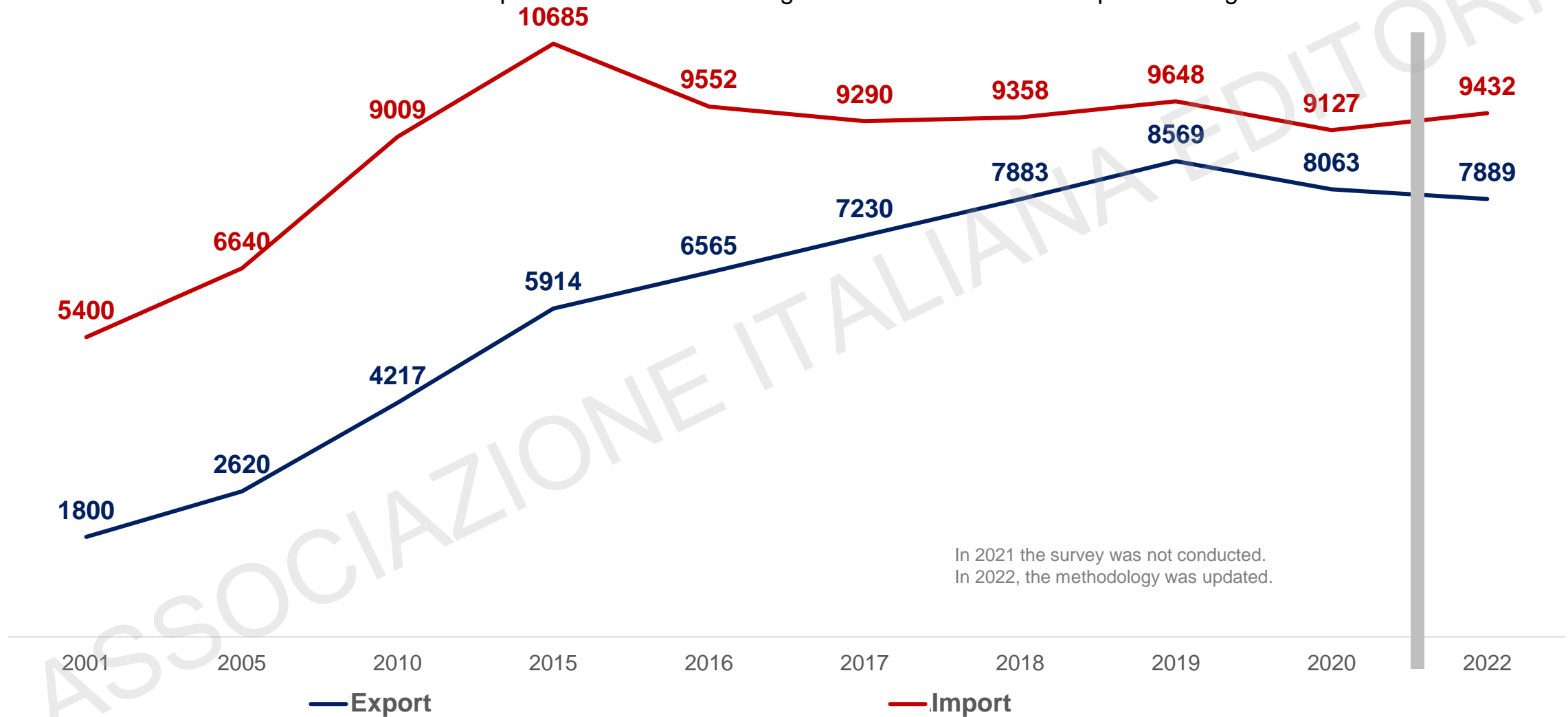
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Foreign rights sales settle down after 2019 boom

But compared to 2010, values have doubled, quadrupled compared to 2001

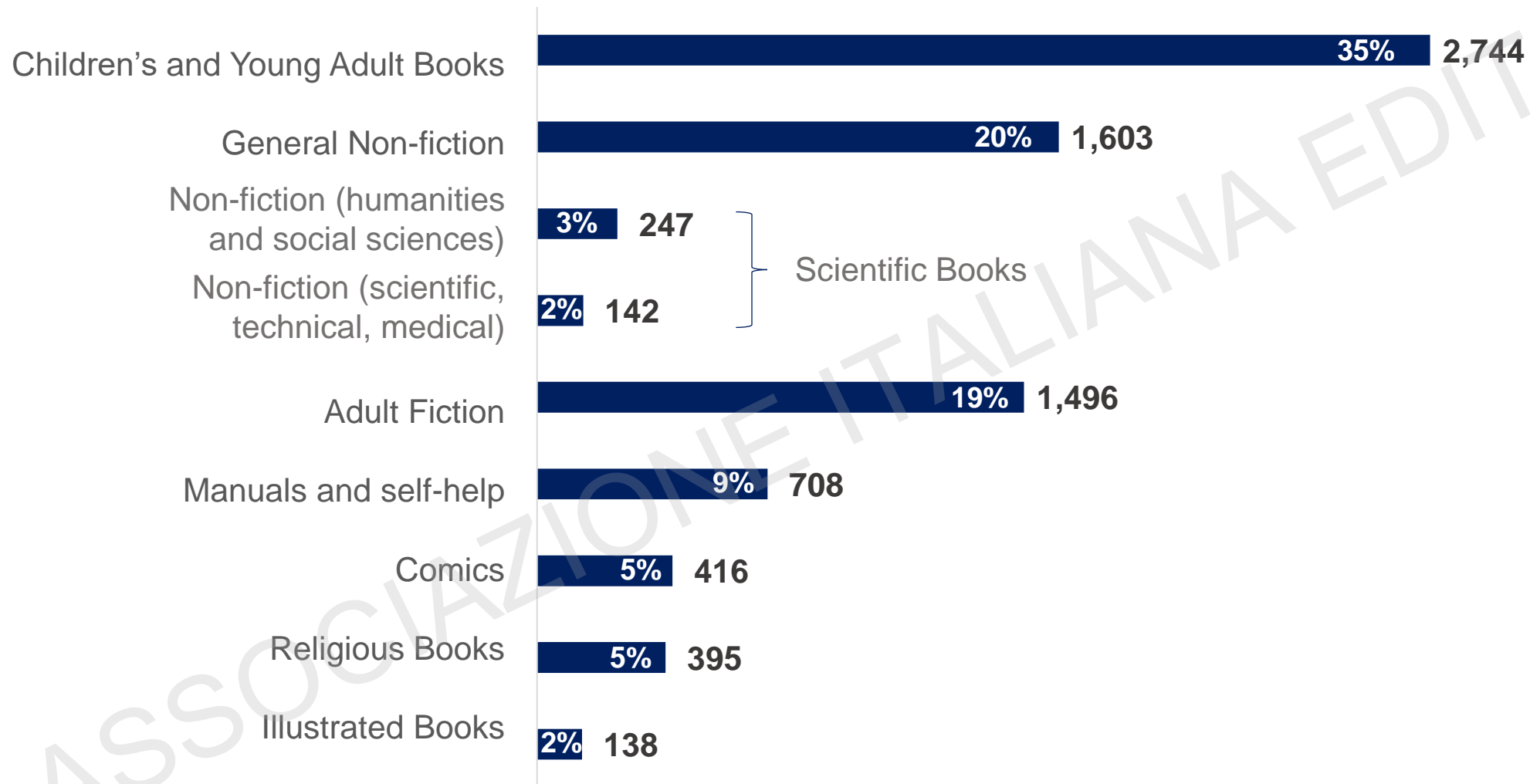
Trends in the sale and purchase of translation rights: 2001-2022 - Values in purchase agreement



Children and young people, nonfiction and fiction

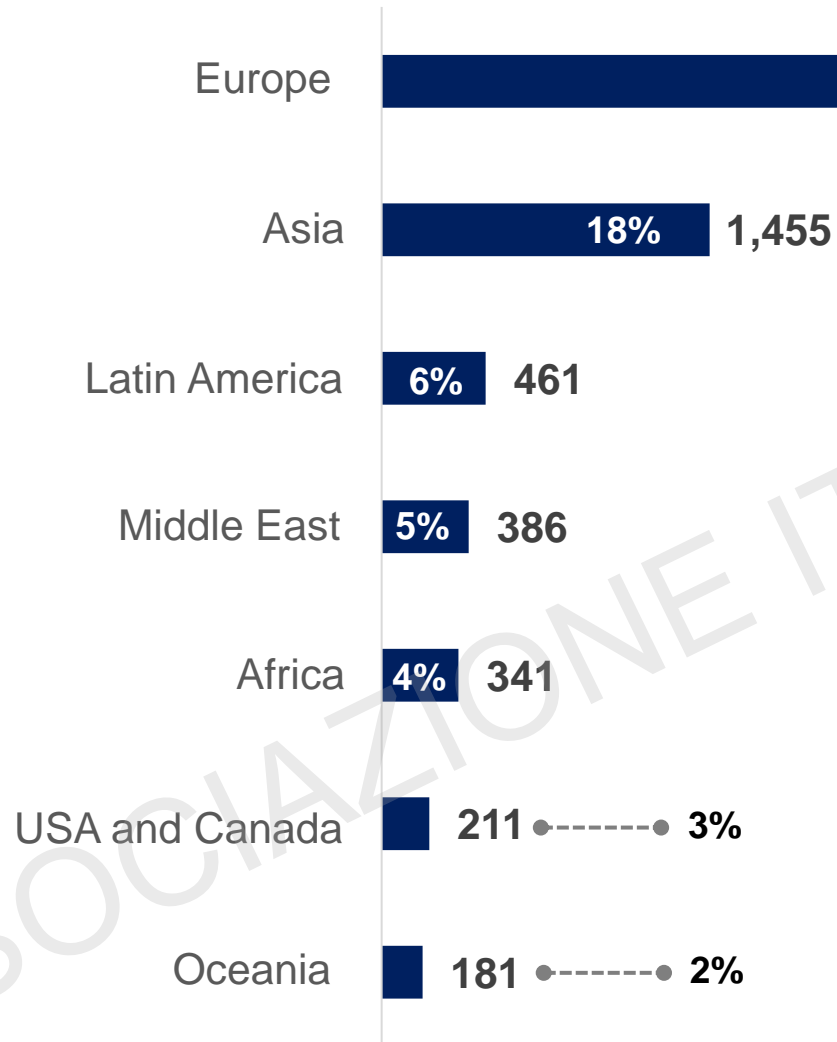
Are the top selling genres to foreign publishers

Values in number of stocks and in % in 2022



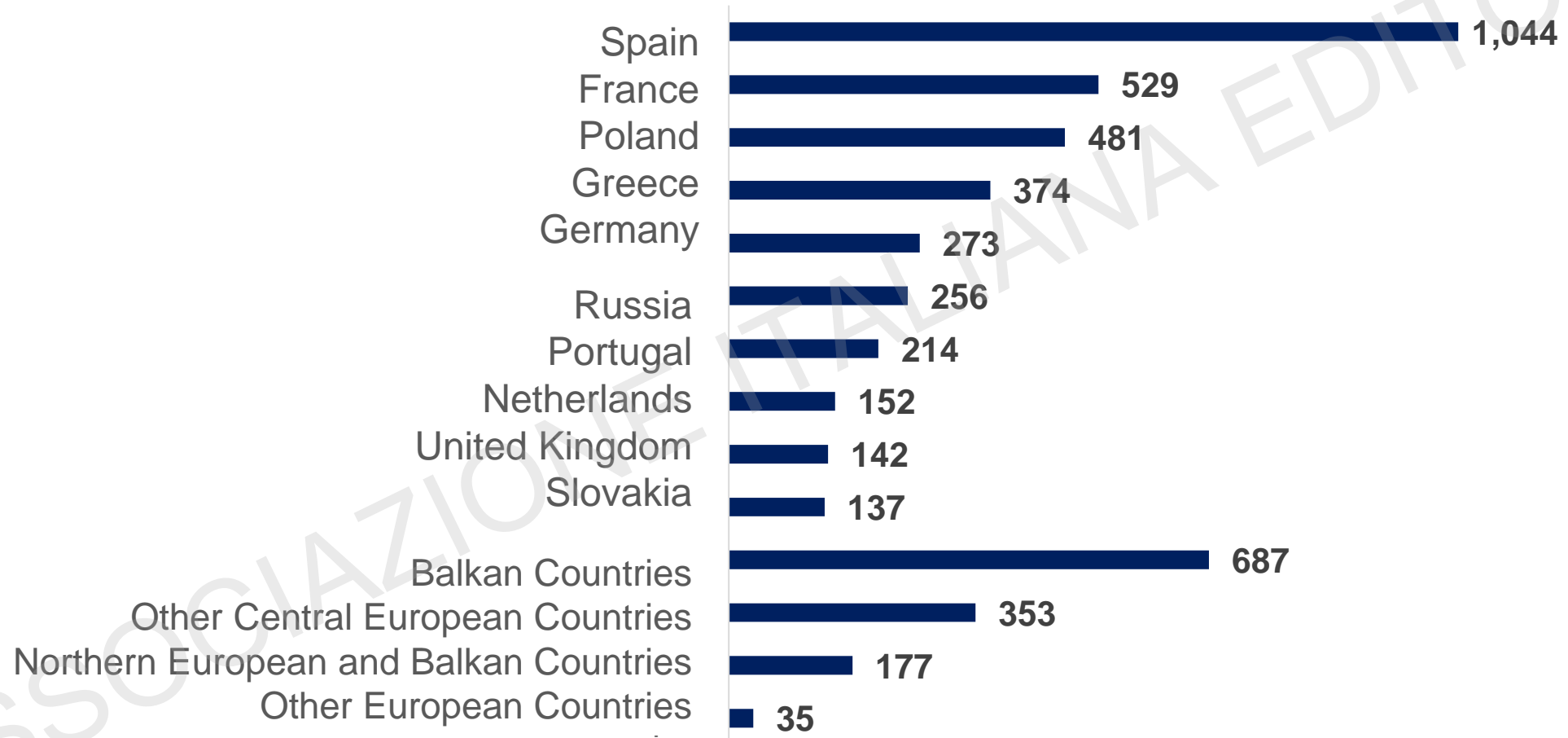
Europe remains the main outlet in the sale of rights

Values in number of stocks and in % in 2022



Spain, France and Poland are first European destination countries in 2022

Values in number of titles and as a % of total European countries.



We report for comparison the 2020 data also it should be remembered that in that year the mobility restrictions, many international fairs had been suspended and the negotiation of sale of rights took place on dedicated platforms: Spain 22%; France 16%; Poland 11%; Greece 5%; Germany 10%; Russia 5%; Portugal 2%; Netherlands 4%; UK 4%; Slovakia 1%

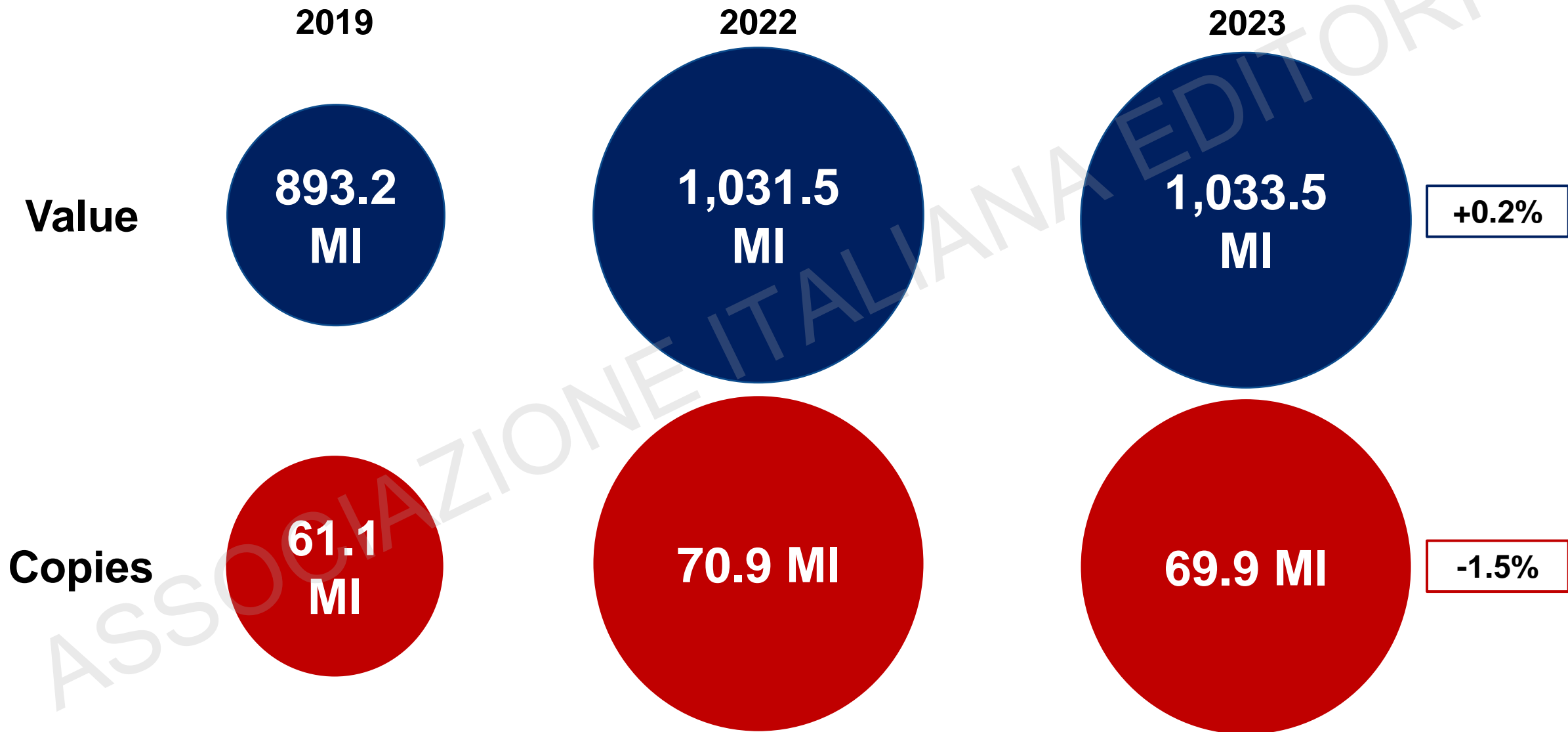
How is 2023 going?
The first 9 months of the year in trade channels
(P1-P9 January 1-September 9)

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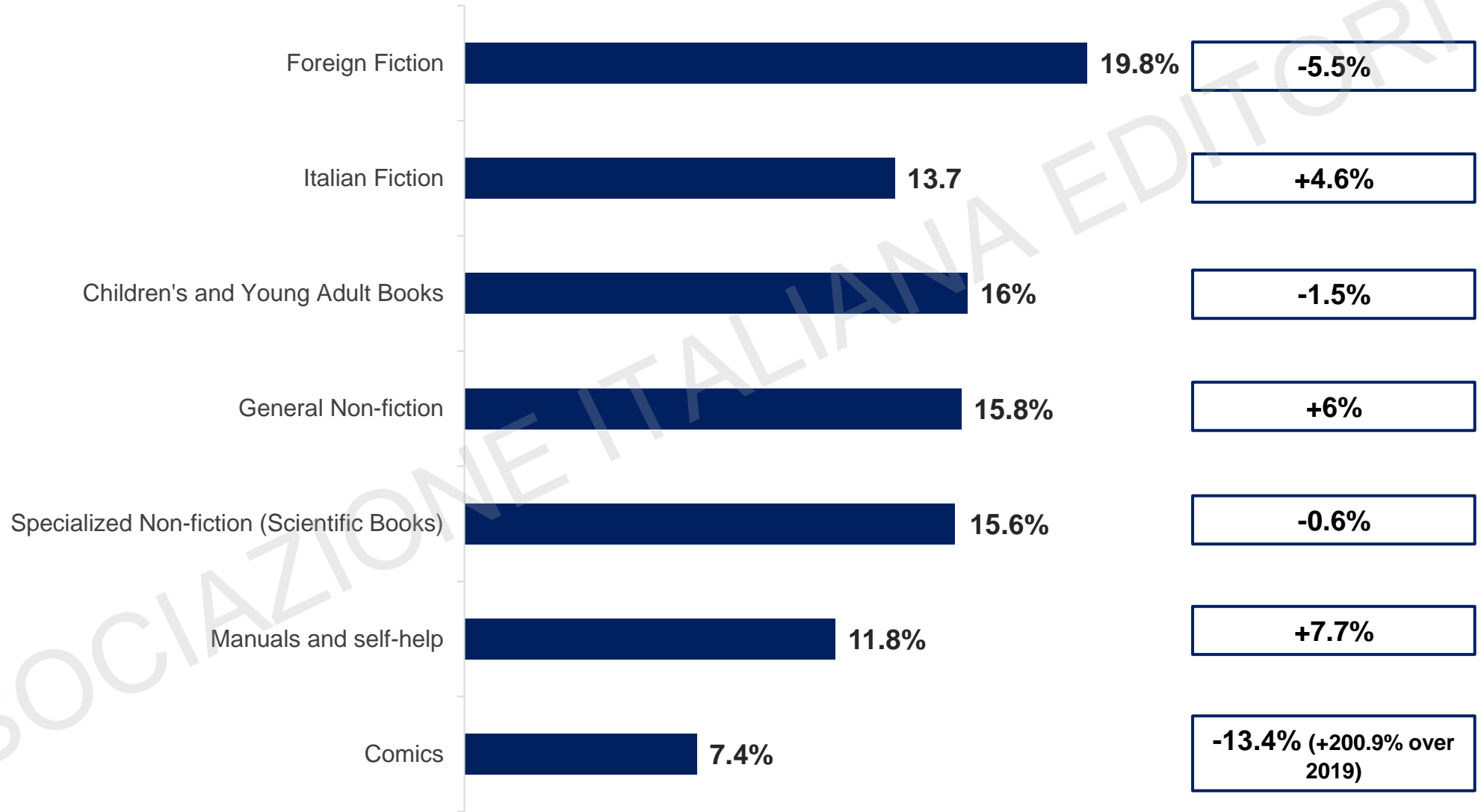
Nine million more copies sold than pre-pandemic year

January 1-September 9. Cumulative values in mln at cover price and number of copies bought, percentage change from previous year



Top selling genres

January 1-September 9. Percentage of total market, percentage changes from previous year





DAL
1869

In the frame of

