

The Italian general book market in 2023, including a focus on the children's market: destination Frankfurt

April 8th 2024, BBPLUS Theatre

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Curated by **AIE** – in the framework of **Aldus Up**

Aldus Focus on... the Italian book market. *With a focus on the children's book market*

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Bologna Children's Book Fair, April 8th 2024

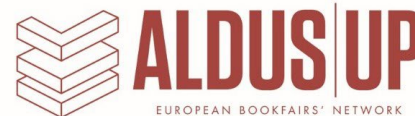


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EUROPEAN BOOKFAIRS' NETWORK



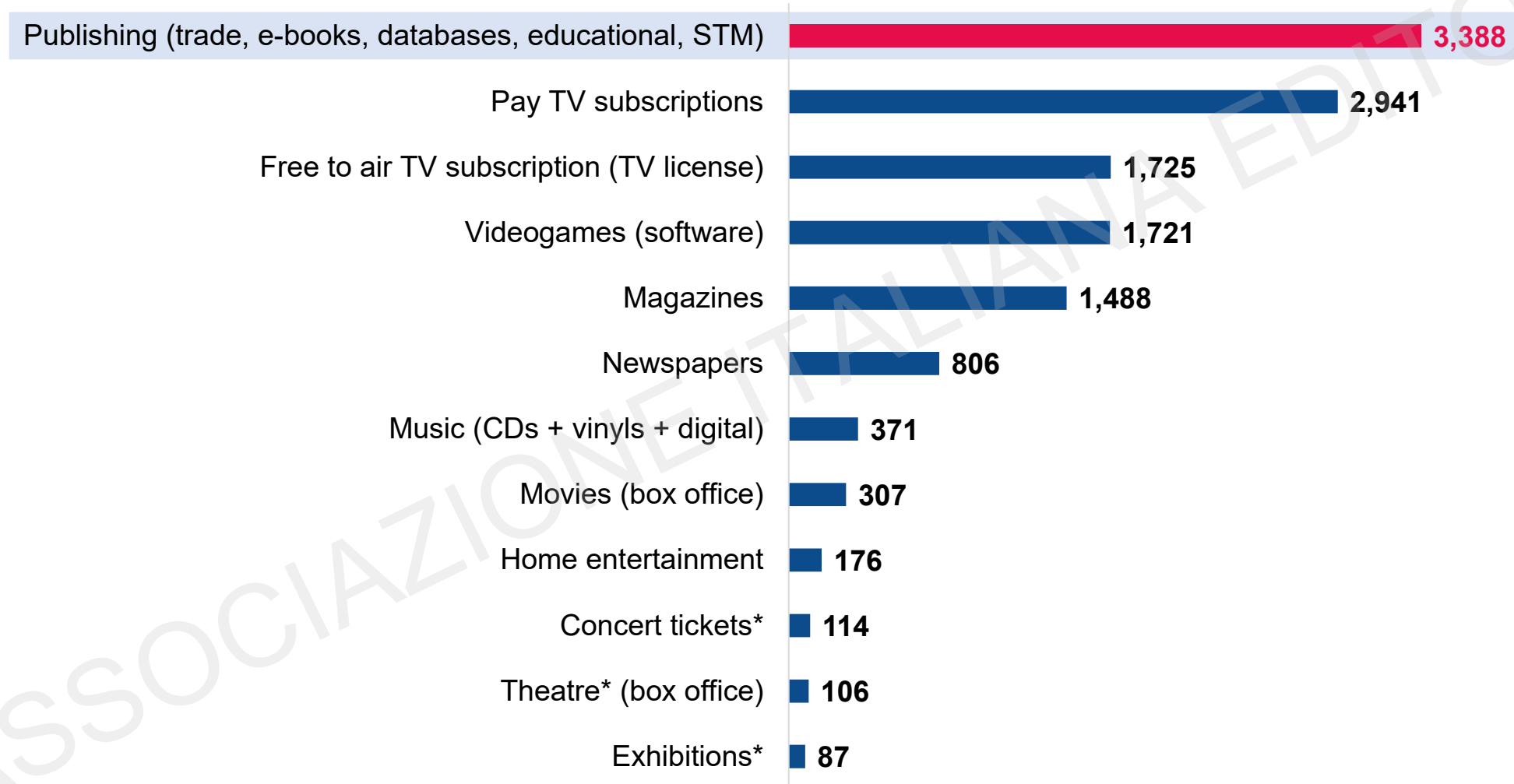
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of the European Union

The Italian Book Market



Publishing is confirmed as the first Italian cultural industry

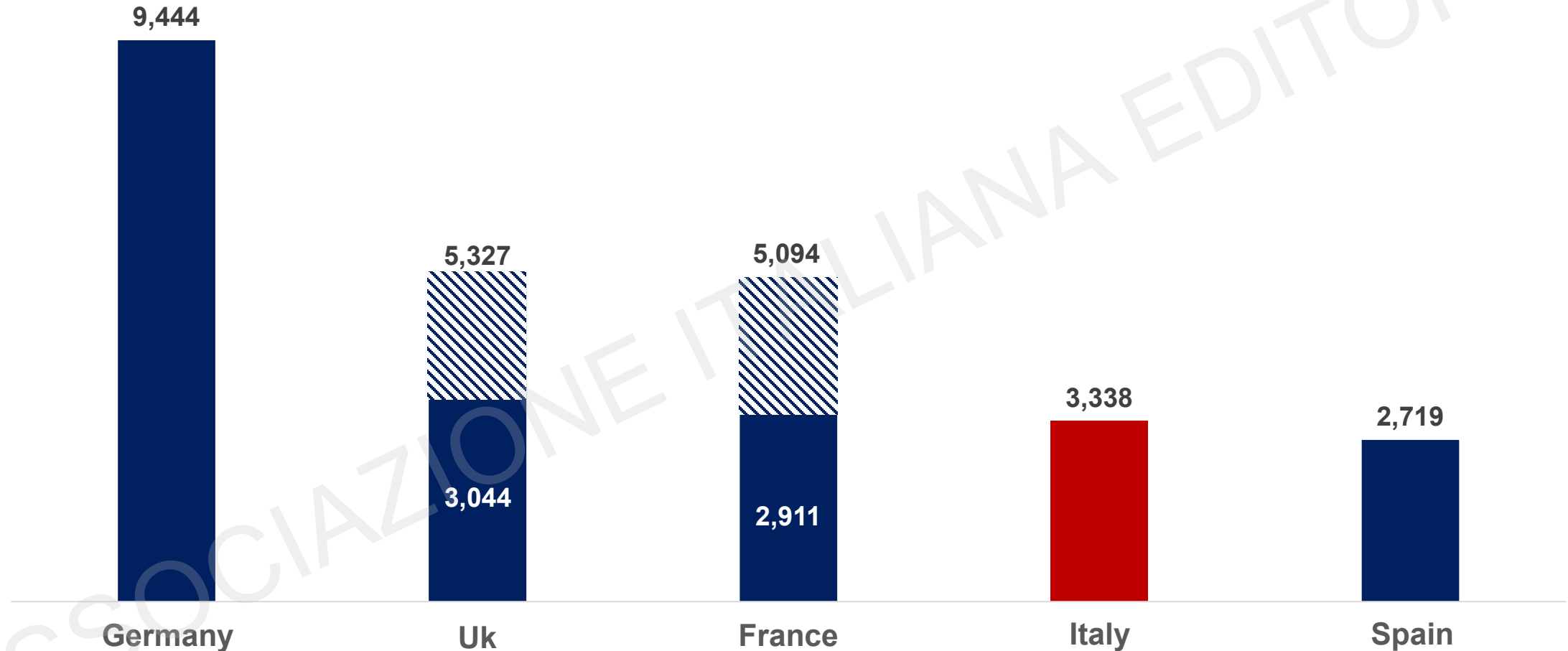
Value of major content industries at constant scope. Values in millions of euros



* 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

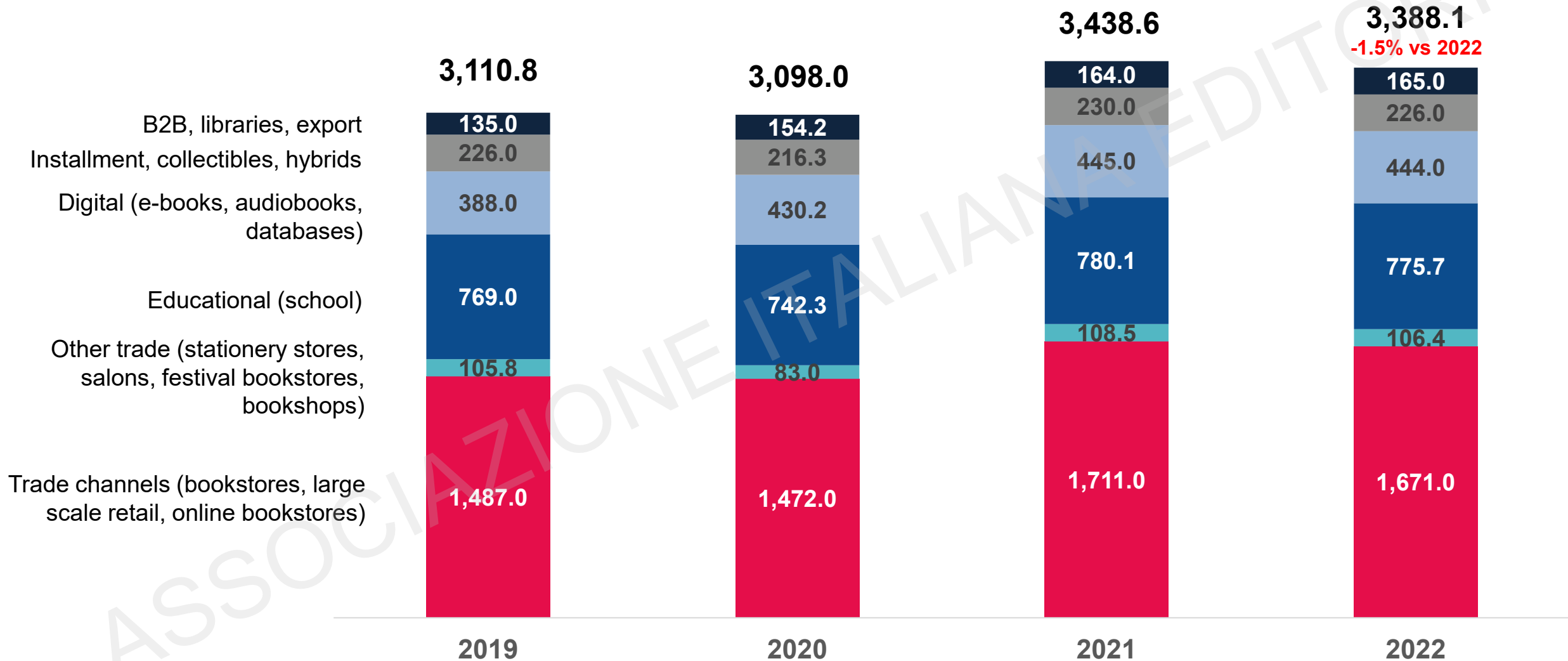


*We have not considered export because Italy does not have a significant "Italian-speaking" market outside its borders, unlike other countries.

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

Market trends in the main publishing segments: 2019-2022

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



The competitive arena

Four major players:

 MONDADORI			
Big media group, active in all market segments, leader in trade, and school text-books, owns a large bookshop chain. In 2016 has been merged with Rizzoli Libri (n. 2 that year). In July 2021 has acquired DeAgostini Scuola, one of the leading players in the segment, becoming n. 1 in the educational market as well.	Focused on trade, expanding in scholarly (HSS), linked to Messaggerie, the leading Italian book distributor and wholesaler. In March 2019 GeMS has acquired 51% of Newton Compton.	Focused on trade; owns the largest bookshop chain and an e-commerce platform. Feltrinelli has acquired 40% of Marsilio (former RCS) and 42.5% of SEM (Società Editrice Milanese).	Growing in trade books and illustrated ones. Took over Bompiani (former RCS) and the Italian Walt Disney book publishing branch. Present in the educational market, particularly for primary schools. Owns a large bookshop chain.

In October 2017, Feltrinelli and Messaggerie have created a joint venture in the e-commerce sector

Other medium size companies are important in particular segments

- Many small and medium publishers are present in trade publishing; new entries after the Mondadori/Rizzoli merge (e.g. Solferino, La Nave di Teseo, SEM); HarperCollins entered the Italian market;
- In textbooks they compete with Zanichelli, Sanoma (which took over Pearson education) and a number of small and medium publishers;
- In the academic and professional segments, the large groups are less relevant:
 - Presence of foreign companies: Wolters Kluwer, Pearson, McGraw-Hill, Springer; acquisition of Giuffrè by Editions Lefebvre Sarrut;
 - Relevant Italian players: Il Mulino, Franco Angeli, and many others + increasing presence of University presses.

Focus on trade books: the trend in revenues in 2023 follows the one in 2022

Turnover (million euros), copies (millions) and %

1,697
MI €



+0.8%
compared to 2022
(+14 MI €)



+14.1%
compared to 2019
(+210 MI €)

Turnover – (trade market):
Cover price. Print books only

111.9
MI



-0.7%
compared to 2022
(-0.8 MI copies)



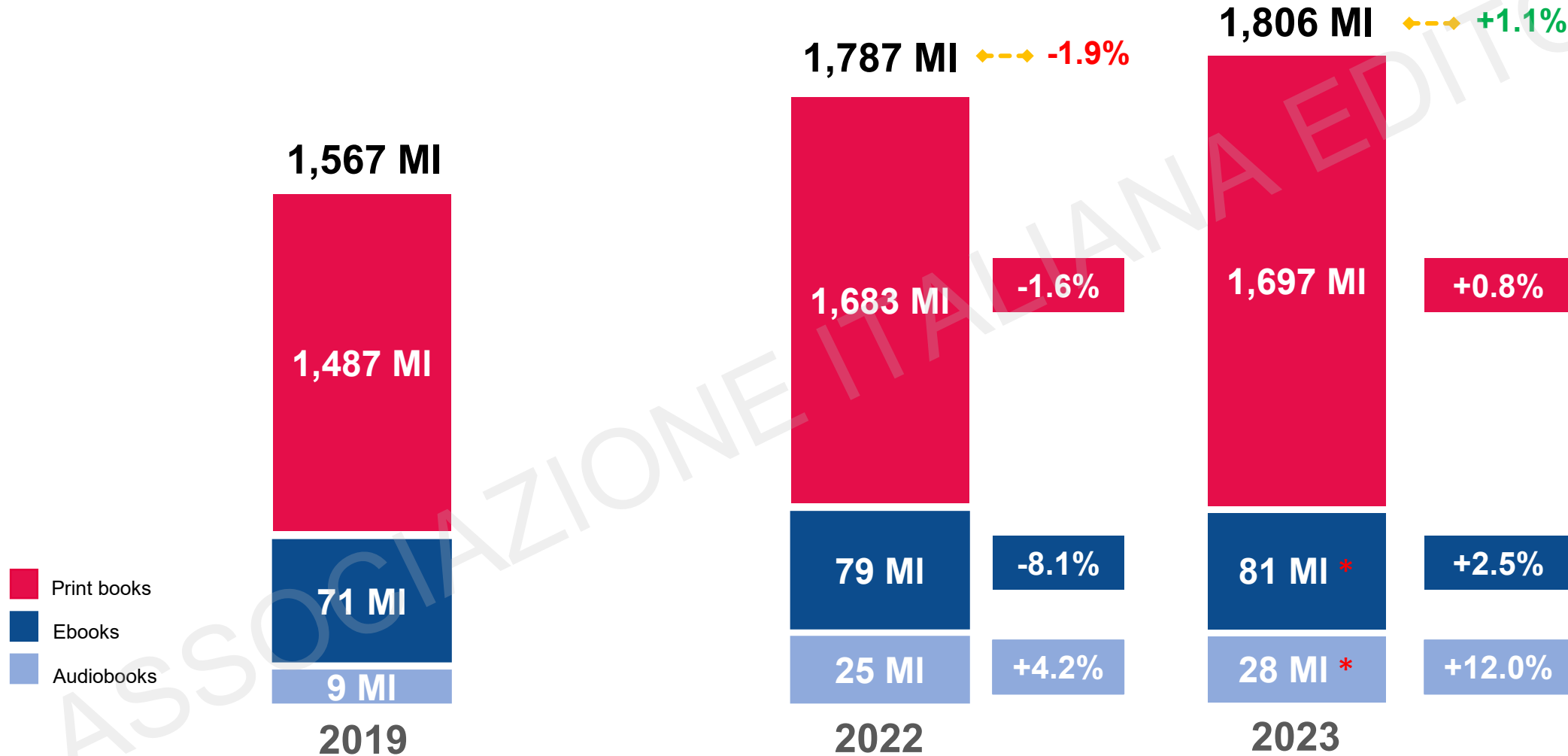
+12.6%
compared to 2019
(+12.5 MI copies)

Copies – (trade market)
Print books only

Value at RRP in the trade market for the 52 weeks of 2023. Comprises sales in physical and online bookstores and large-scale retail distribution (GDO). Excluding school textbooks.

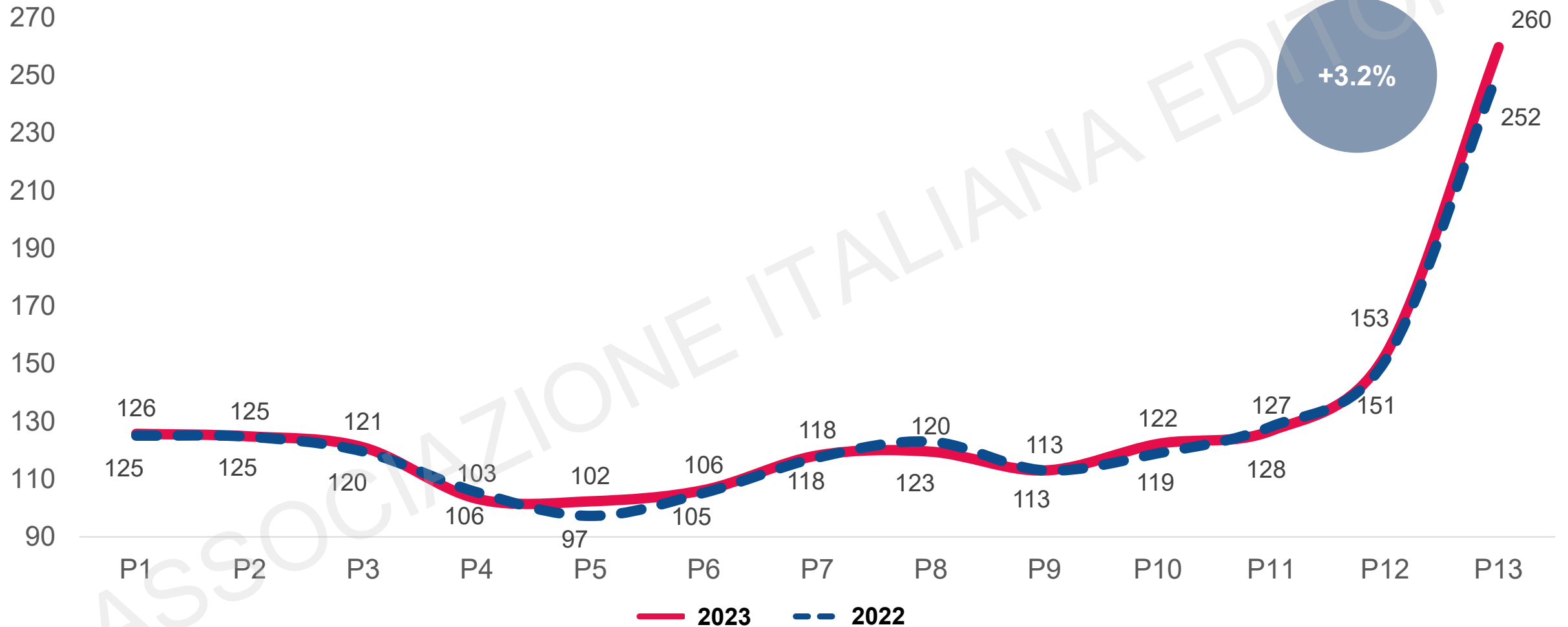
Focus on trade books: print, digital books and audiobooks

Turnover (million euros) and % variation versus the previous year



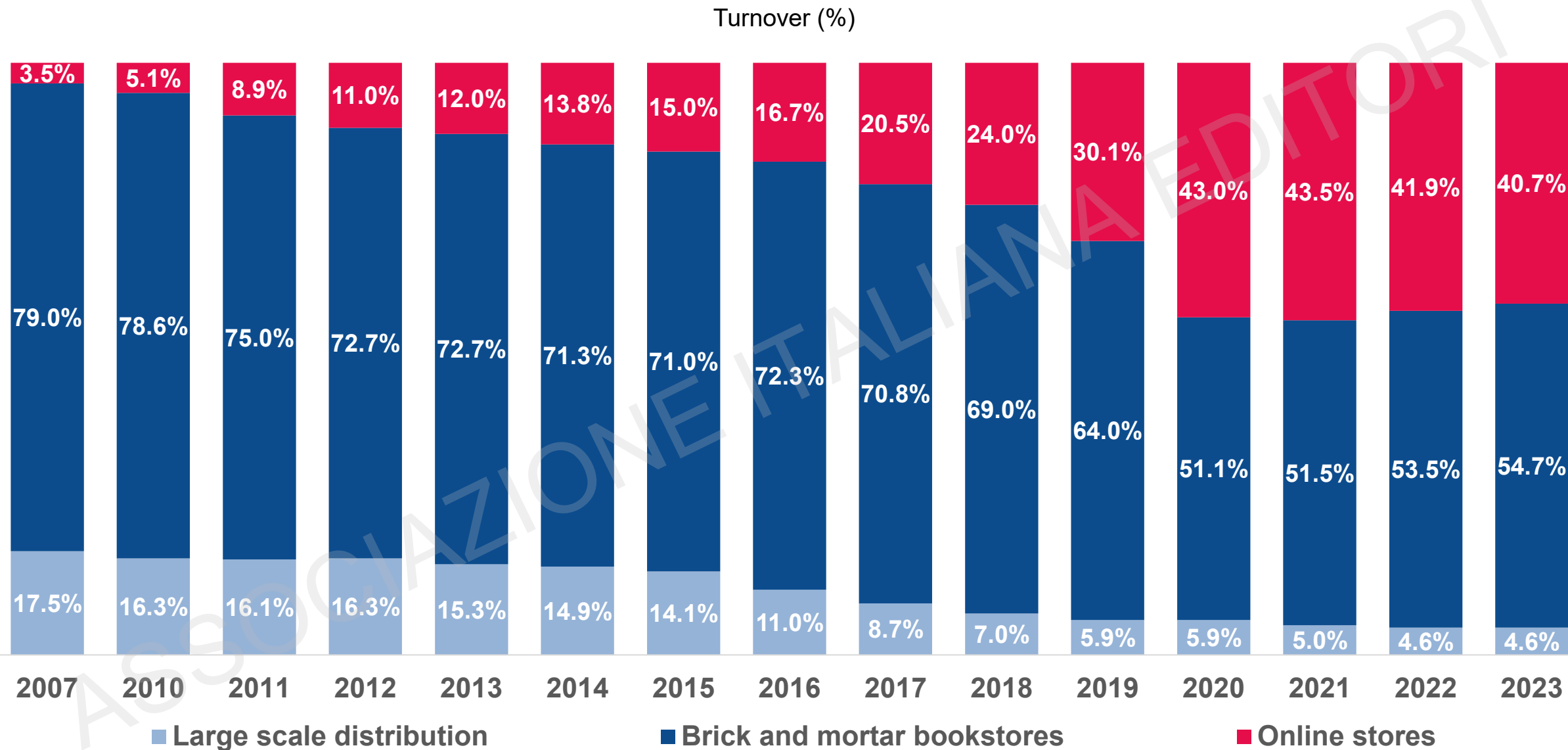
Focus on trade books: the trend on monthly spending mirrors the one from 2022, with an increase upon Christmas

Turnover (million euros) and %



Value at RRP in the trade market for the 52 weeks of 2023. Comprises sales in physical and online bookstores and large-scale retail distribution (GDO). Excluding school textbooks.

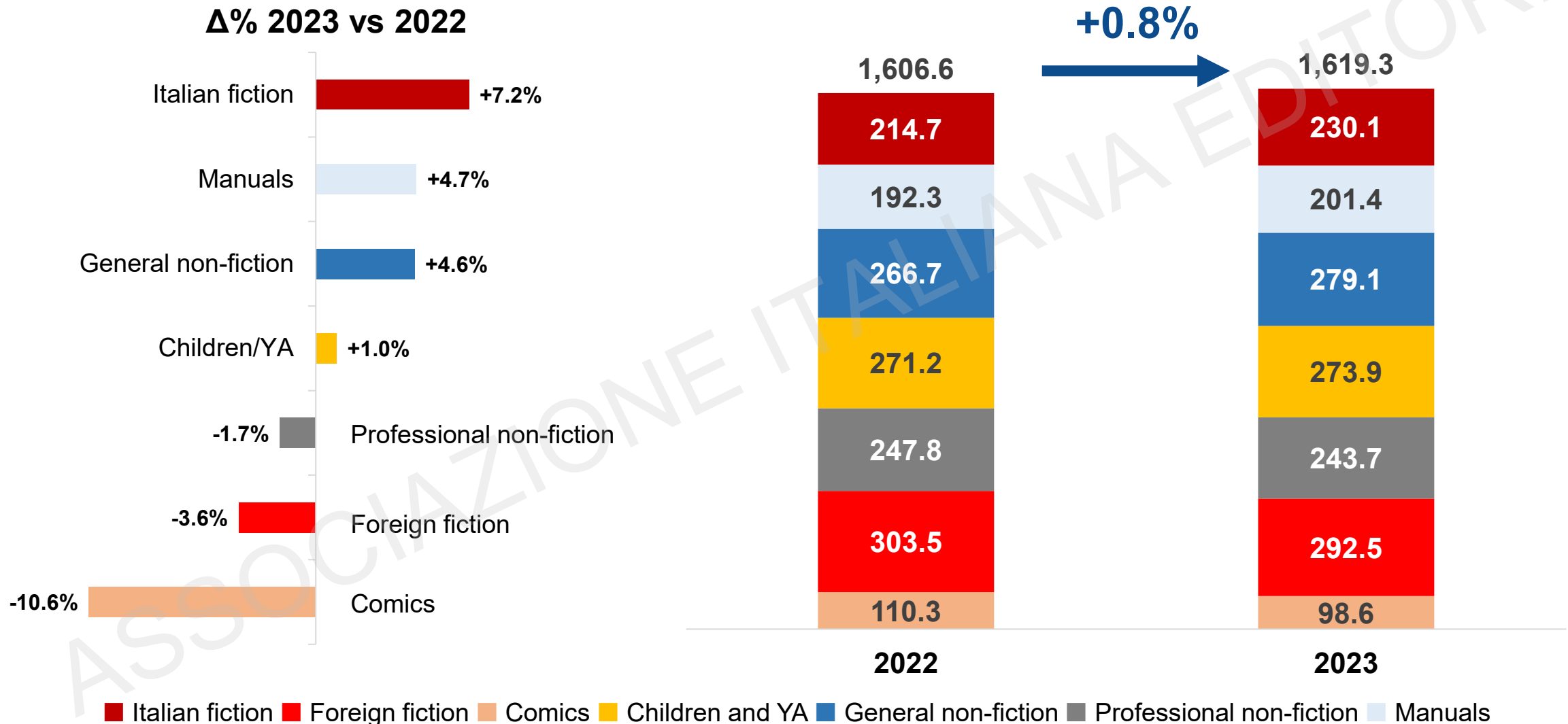
Market share of trade channels (excluding e-books): 2007-2023



Genres and their trends

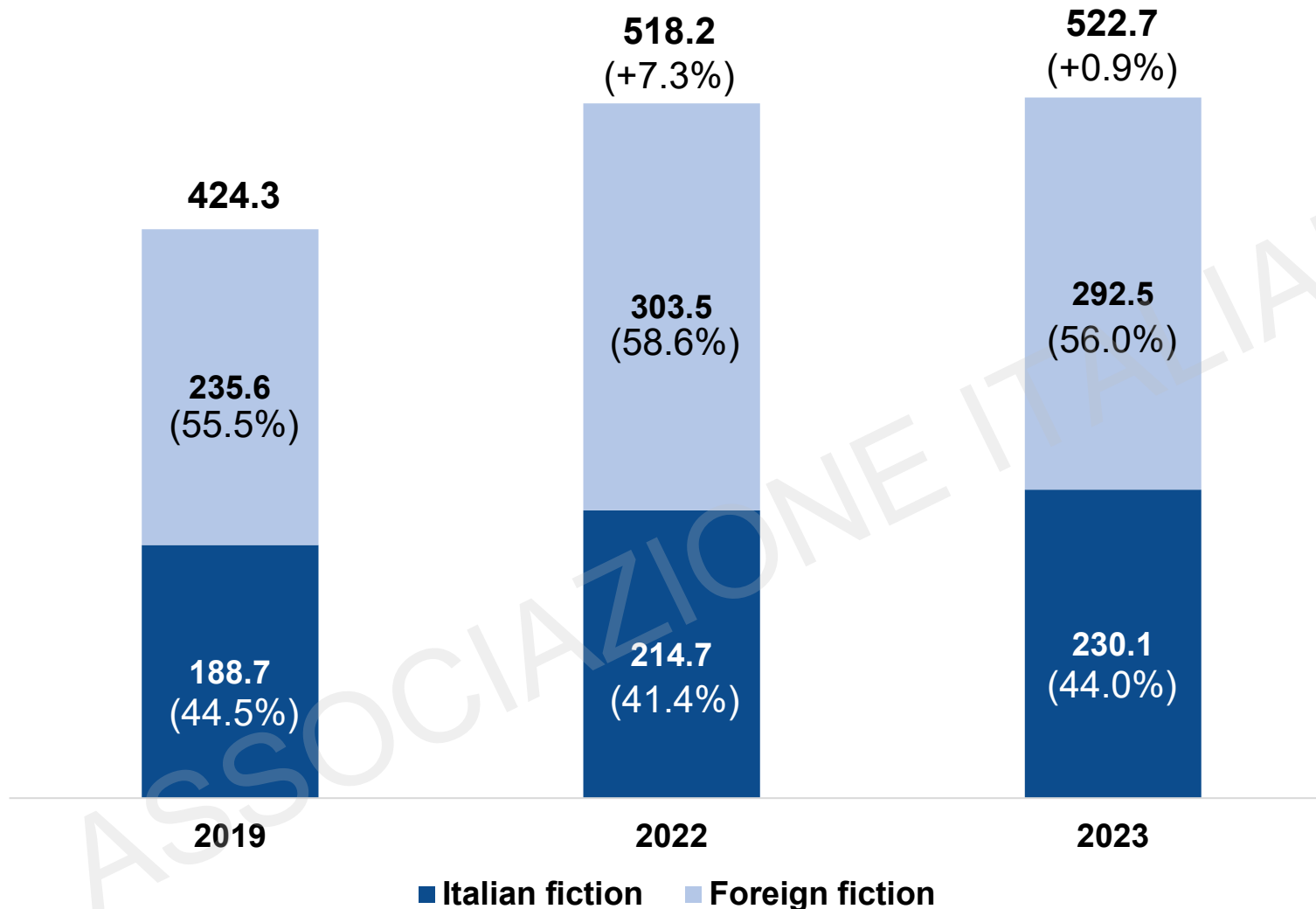
Composition of the trade market: 2022-2023

Turnover (million euros), print books only, and %. Large-scale distribution excluded



Italian fiction: 2019-2023

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



Italian top 5 in 2023



La portalettere,
F. Giannone,
Nord
(January 2023)



Tre ciotole,
M. Murgia,
Mondadori
(May 2023)



La vita intima,
N. Ammaniti,
Einaudi
(January 2023)



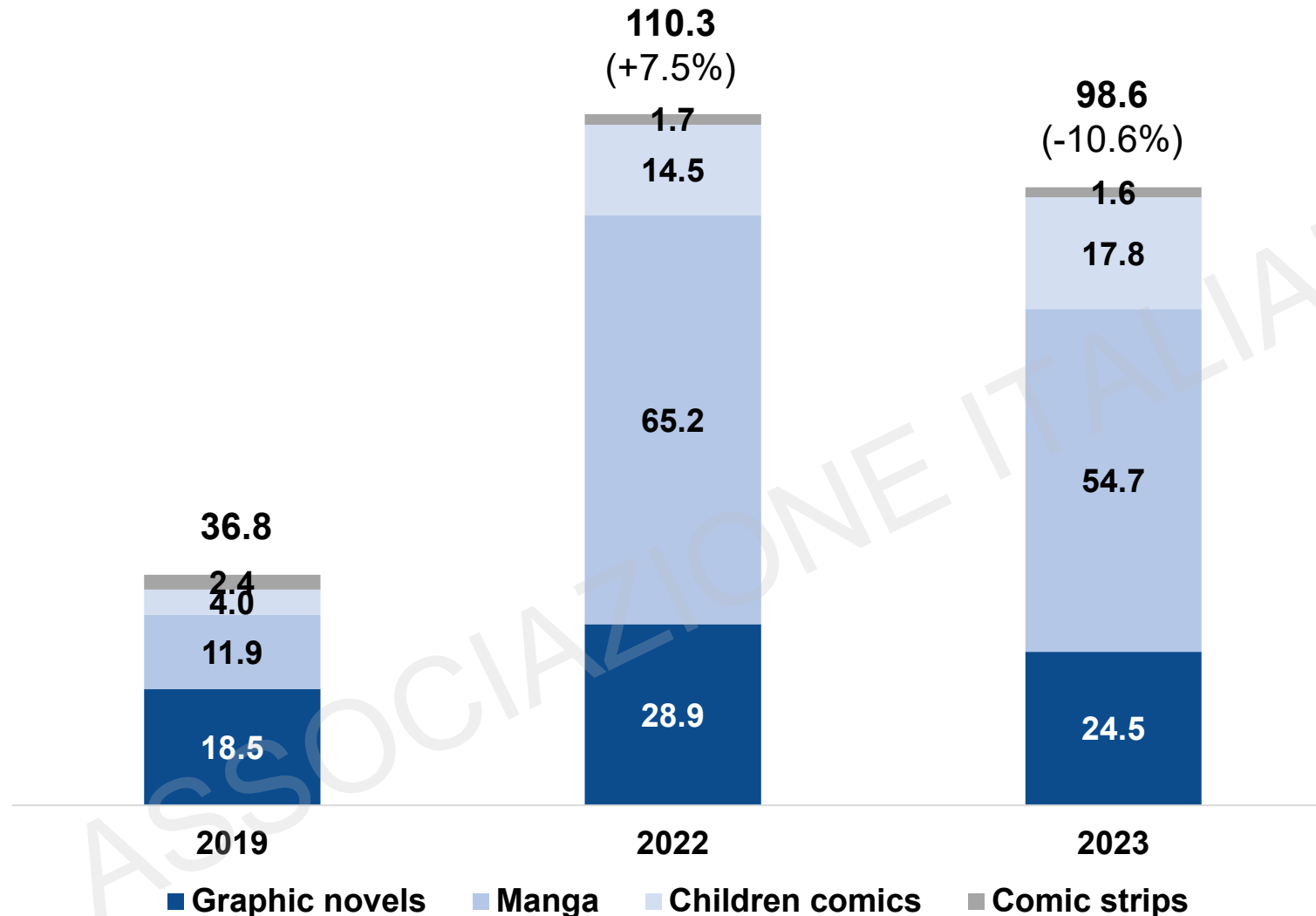
Come d'aria,
A. D'Adamo, Elliot
(January 2023)



Tutto è qui per te,
F. Volo, Mondadori
(November 2023)

Comics: 2019-2023

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



Italian top 5 in 2023



Divertimenti.
Pera Toons, Tunué
(May 2023)



Ridi a CreepyPelle.
Pera Toons, Tunué
(October 2022)



Ridi che è meglio,
Pera Toons,
Tunué
(October 2020)



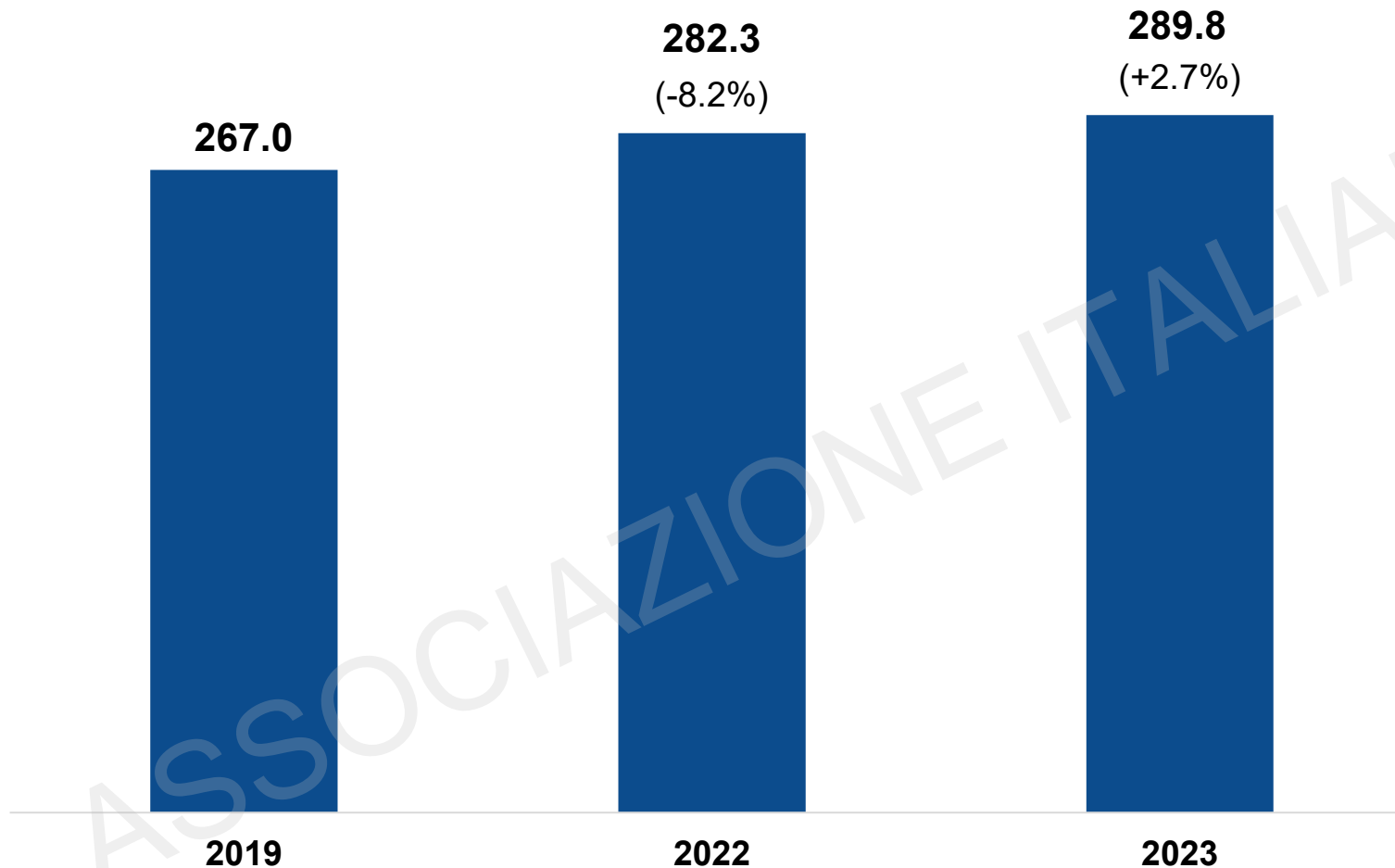
Giochi e risate,
Pera Toons, Tunué
(May 2022)



Fatti una risata.
Pera Toons, Tunué
(October 2023)

Cultural non-fiction: 2019-2023

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



Italian top 5 in 2023



Il mondo al contrario,
R. Vannacci, Ind.
published
(August 2023)



Quando eravamo i padroni del mondo.
A. Cazzullo,
HarperCollins
(September 2023)



Buchi bianchi,
C. Rovelli, Adelphi
(March 2023)



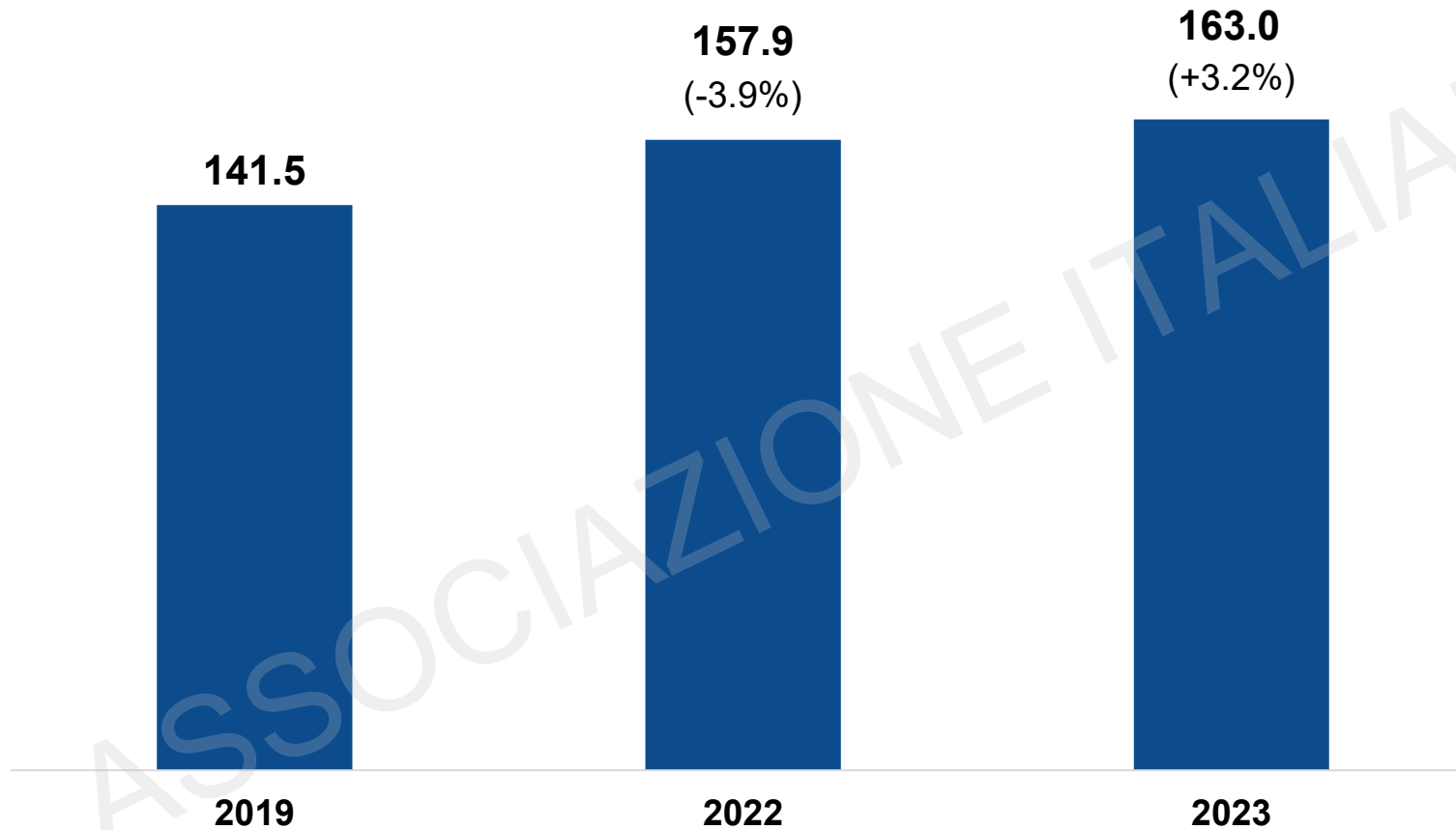
Prendetevi la luna,
P. Crepet, Mondadori
(June 2023)



Che cosa vi siete persi.
G. Scotti, Rizzoli
(October 2023)

Manuals: 2019-2023

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



Italian top 5 in 2023



Profondo come il mare, leggero come il cielo,
G. Gotto, Mondadori
(February 2023)



In cucina con la friggitrice ad aria,
B. Rossi,
Mondadori Electa
(June 2023)



Perfetti o felici.
S. Andreoli, Rizzoli
(March 2023)



Il libro d'oro. Tutte le mie ricette più amate,
Mondadori Electa
(October 2023)

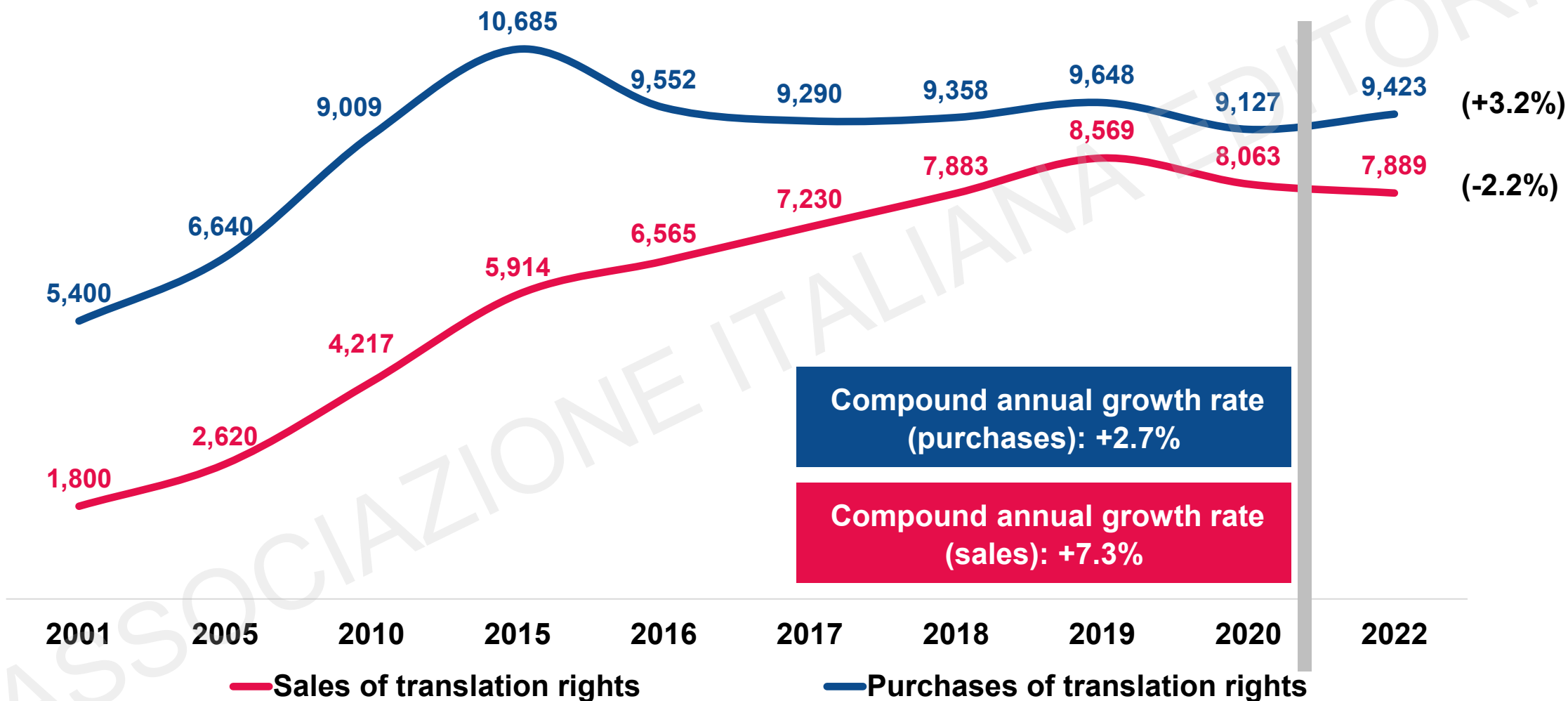


Riscrivi le pagine della tua vita. A. De Simone, A. M. Sepe, Rizzoli
(July 2023)

Sale and acquisition of translation rights

Sale and purchase of translation rights: 2001-2022

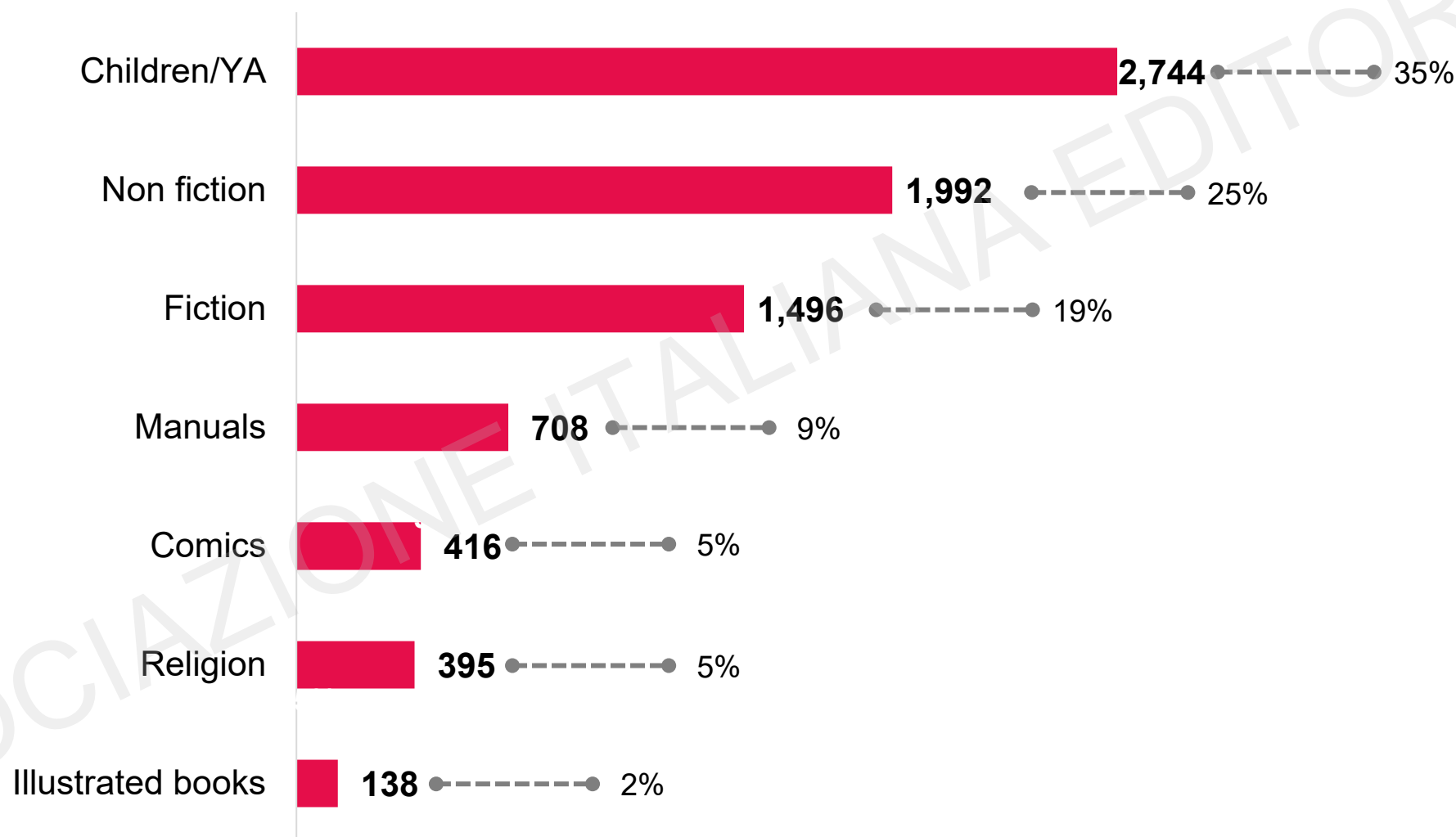
Values in number of contracts and %



The survey was not conducted in 2021. Data collection method has been updated in 2022.

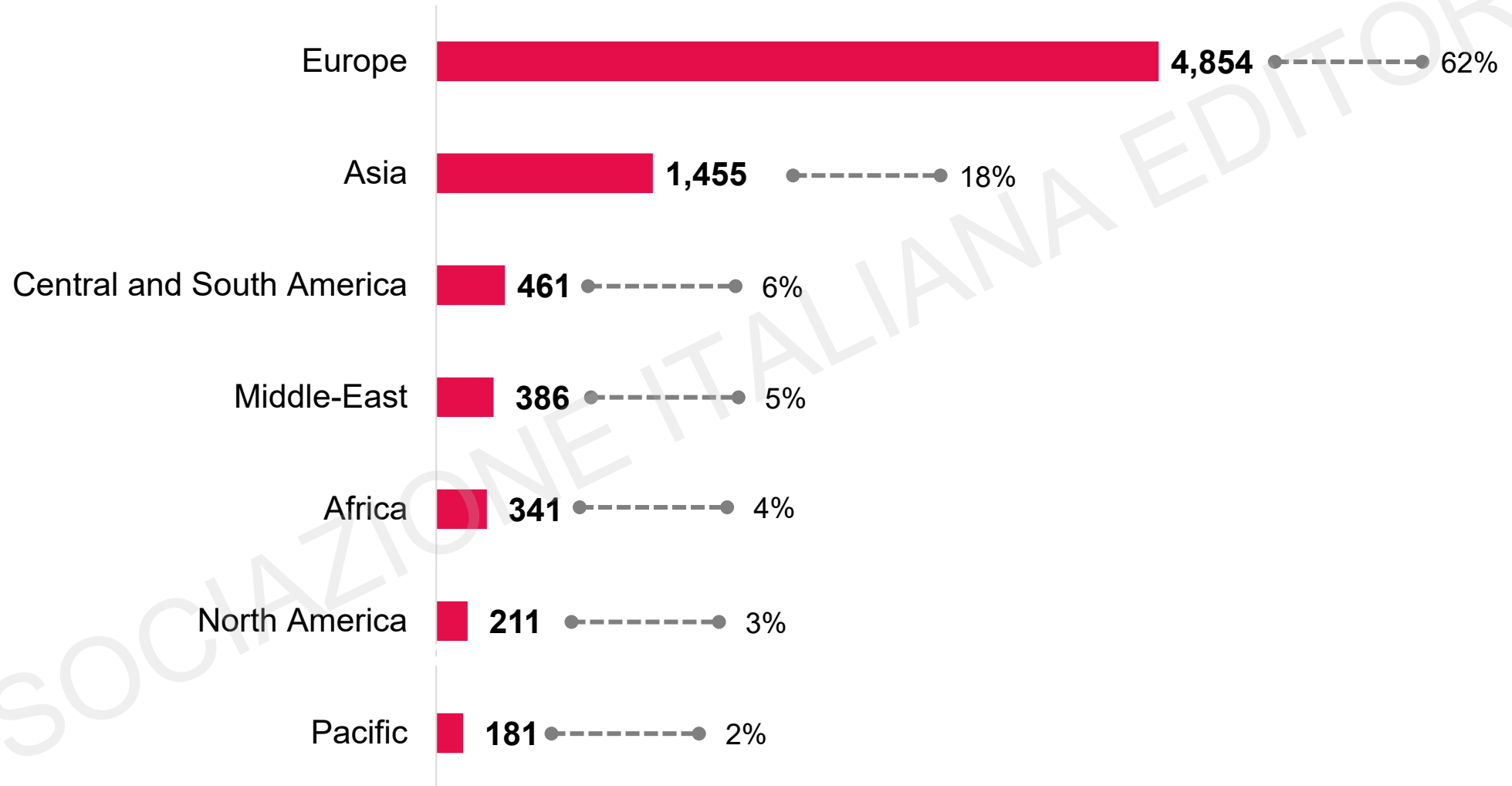
Sale of translation rights by category: 2022

Values in number of contracts and %



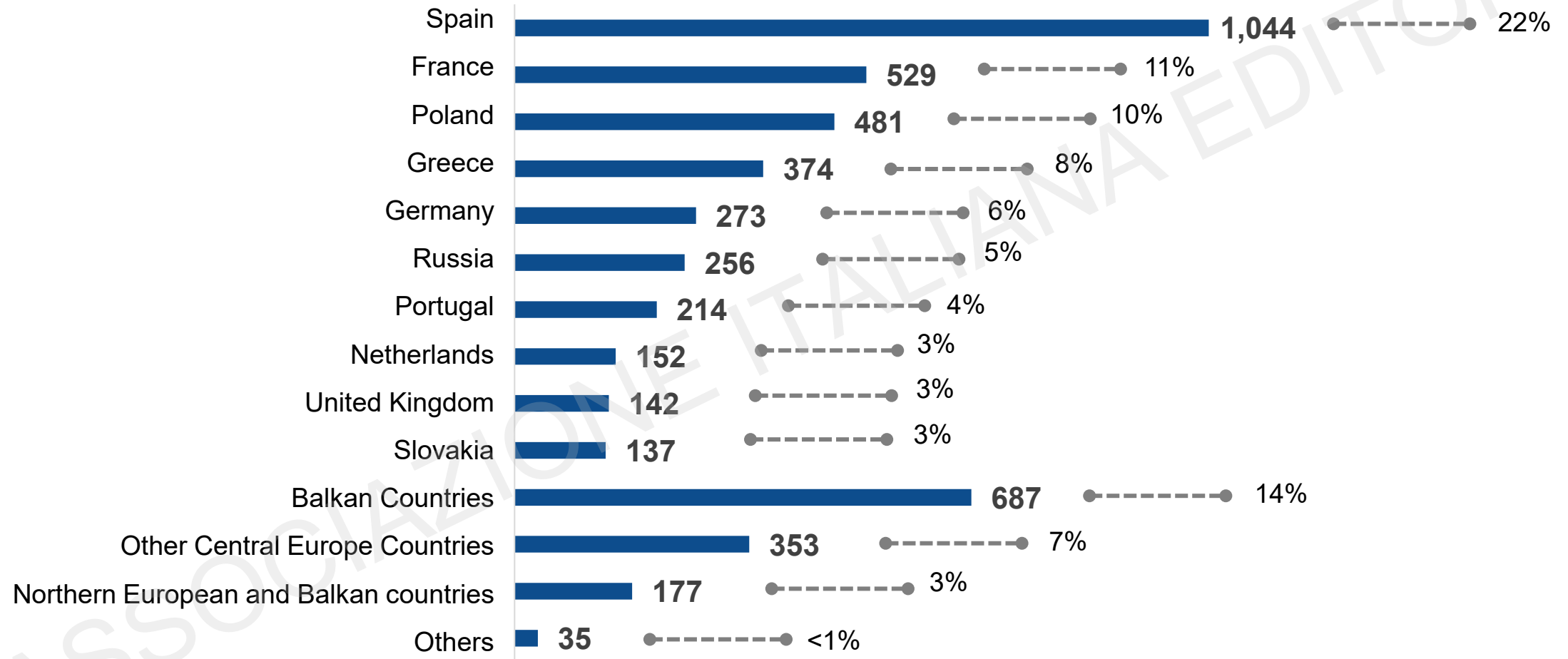
Sale of translation rights by geographical area: 2022

Values in number of contracts and %



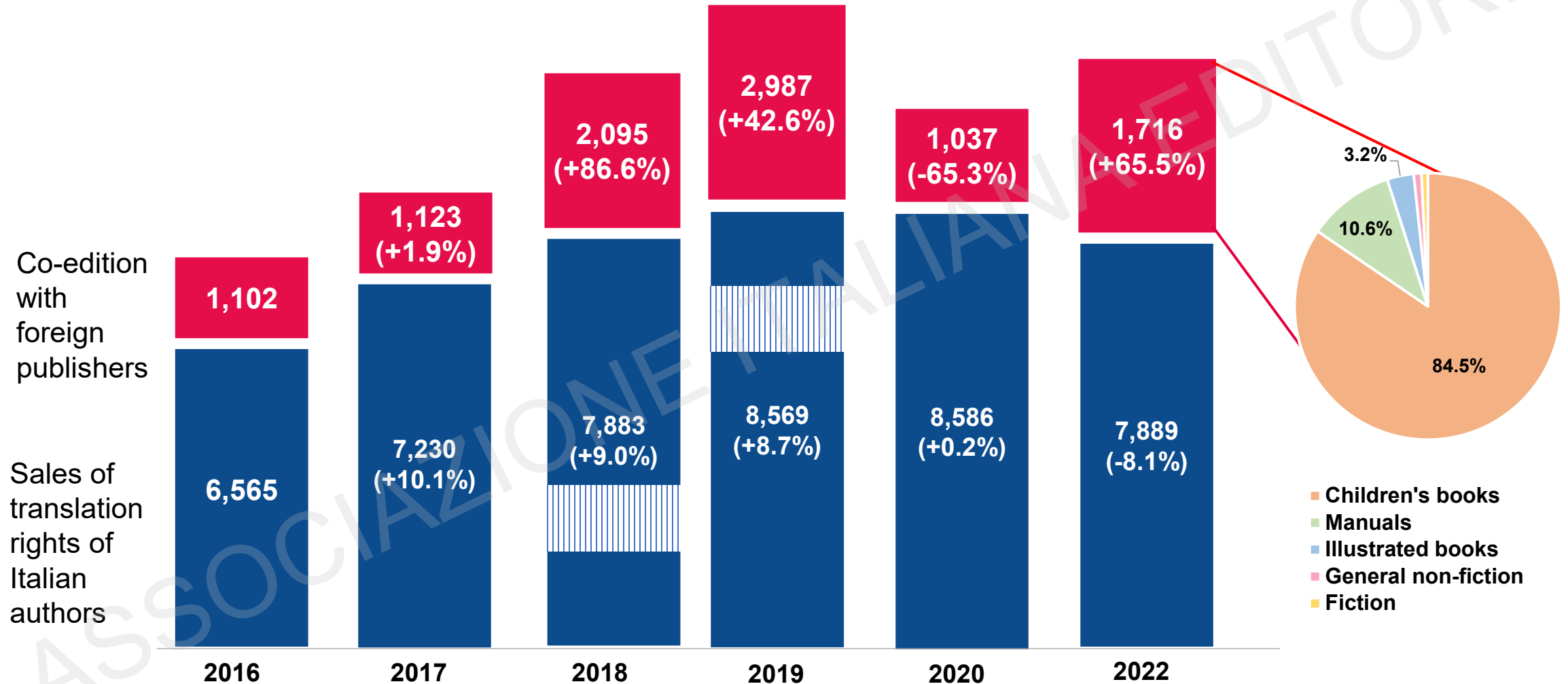
Focus on the European market

Values in number of contracts and %



Co-editions by category: 2016-2022

Number of titles. Percentages are variations vs. the previous year

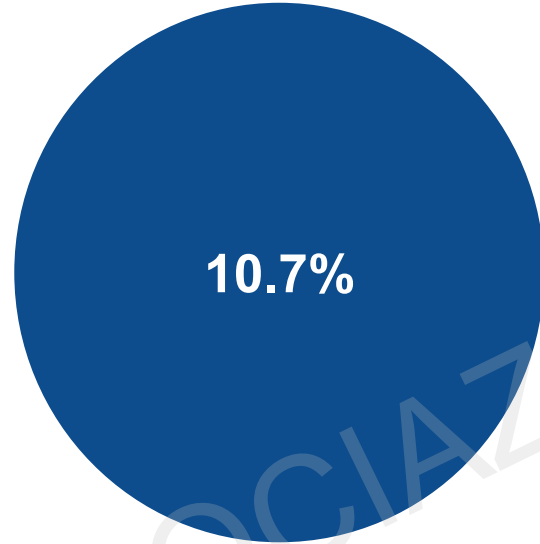


The survey was not conducted in 2021. Data collection method has been updated in 2022.

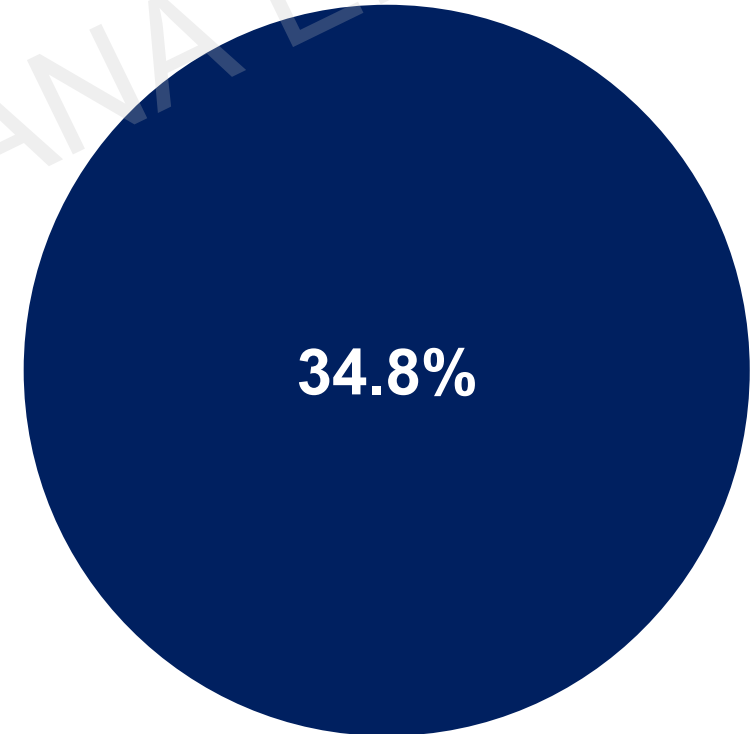
Children's books: an essential production for Italian export

Number of titles and translation rights as %

% of children's books on the total of
book production in 2022

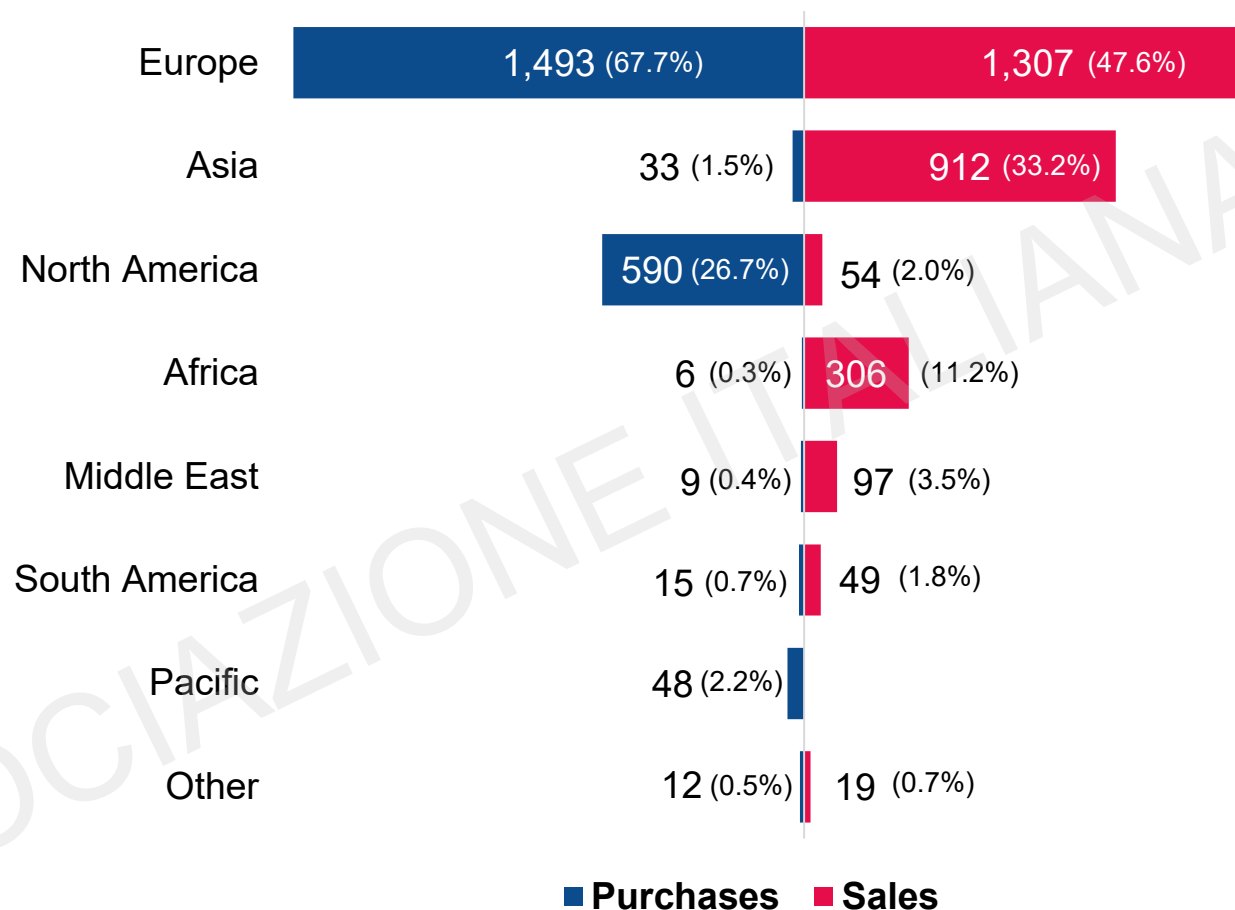


% of children's books on the total of
translation rights sold in 2022



Focus on children's books translation rights: 2022

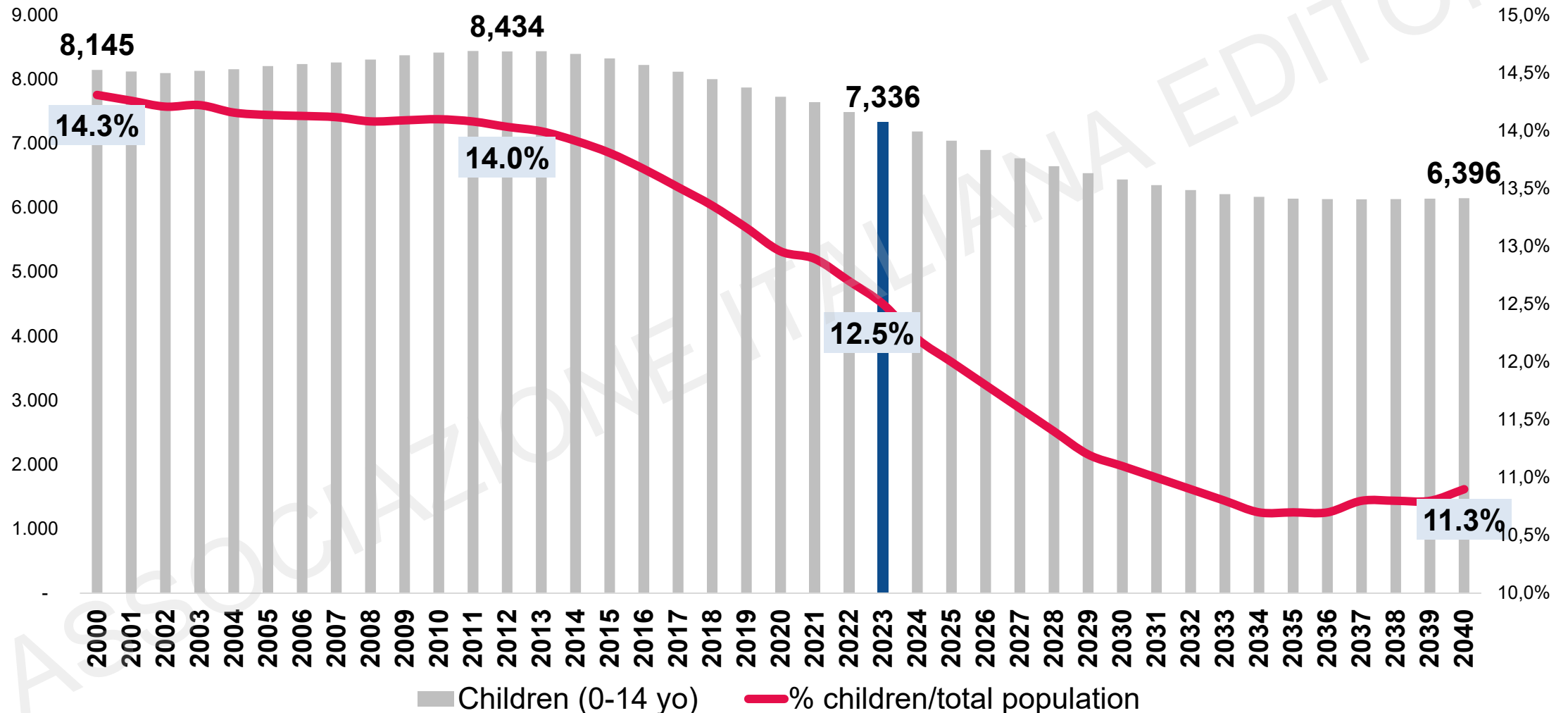
Values and % reference the number of contracts



Focus on the children's book market

Demographic development (and forecast), population 0-14 yo: 2000-2040

Resident population (0-14 years old) on January 1st. Thousands of children and % of children in the total population



Production and composition of children's books: 2022

Number of titles and %. Variations are related to 2021

Books



New titles

8,625
(-2.5% vs 2021)

Average cover price (non-weighted)

12.93 €
(+4.0% vs 2021)

E-books



New titles

1,884
(-10.3% vs 2021)

Average cover price (non-weighted)

6.71 €
(+3.4% vs 2021)

Unclassified

0.4%

11-13 years

5.7%

9-10 years

9.3%

7-8 years

16.1%

5-6 years

27.7%

3-4 years

34.3%

0-2 years

6.5%

Weight of children's book market: 2023

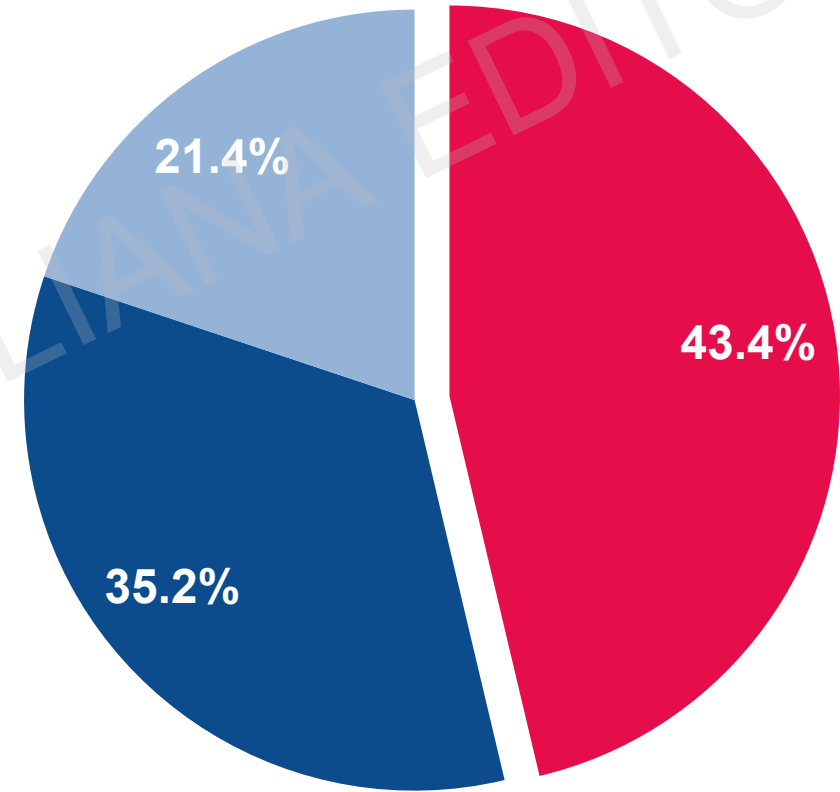
Turnover (million euros) and %. Print books only



Turnover – (trade market):
Cover price. Print books only

+1.0%
compared to 2022
(+3 MI €)

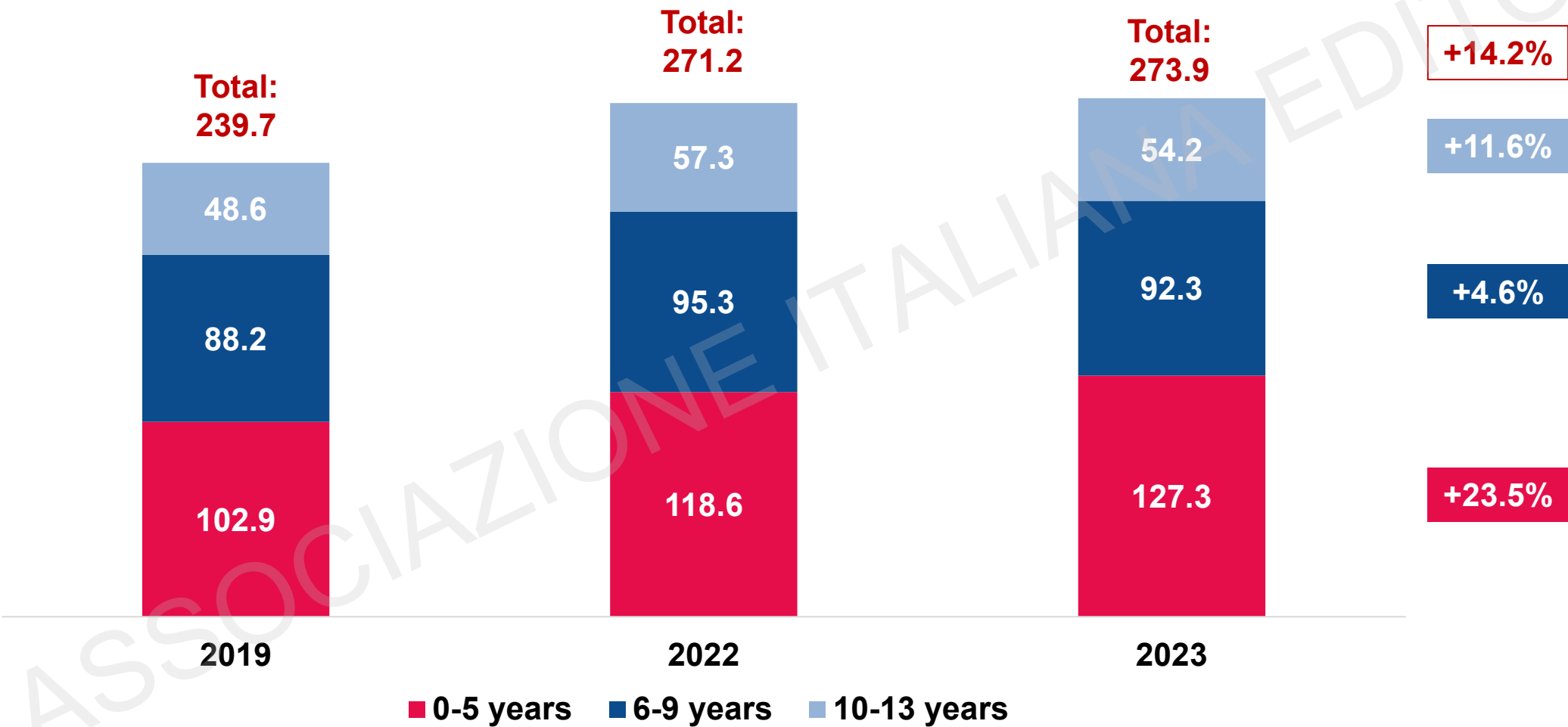
+14.2%
compared to 2019
(+34 MI €)



■ 0-5 years ■ 6-9 years ■ 10-13 years

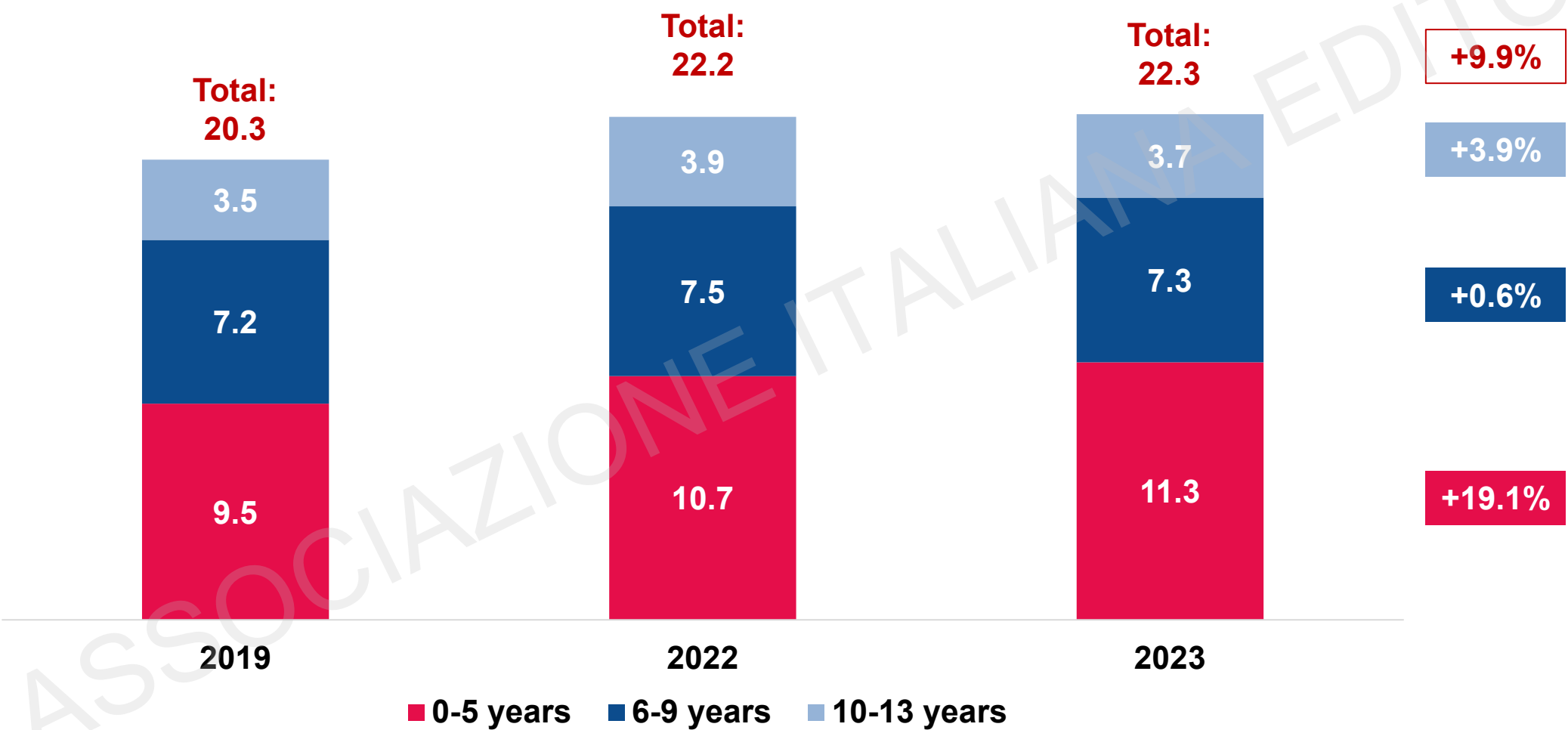
Composition of children's book market (turnover): 2019-2023

Turnover (million euros). Print books only. % are related to 2019



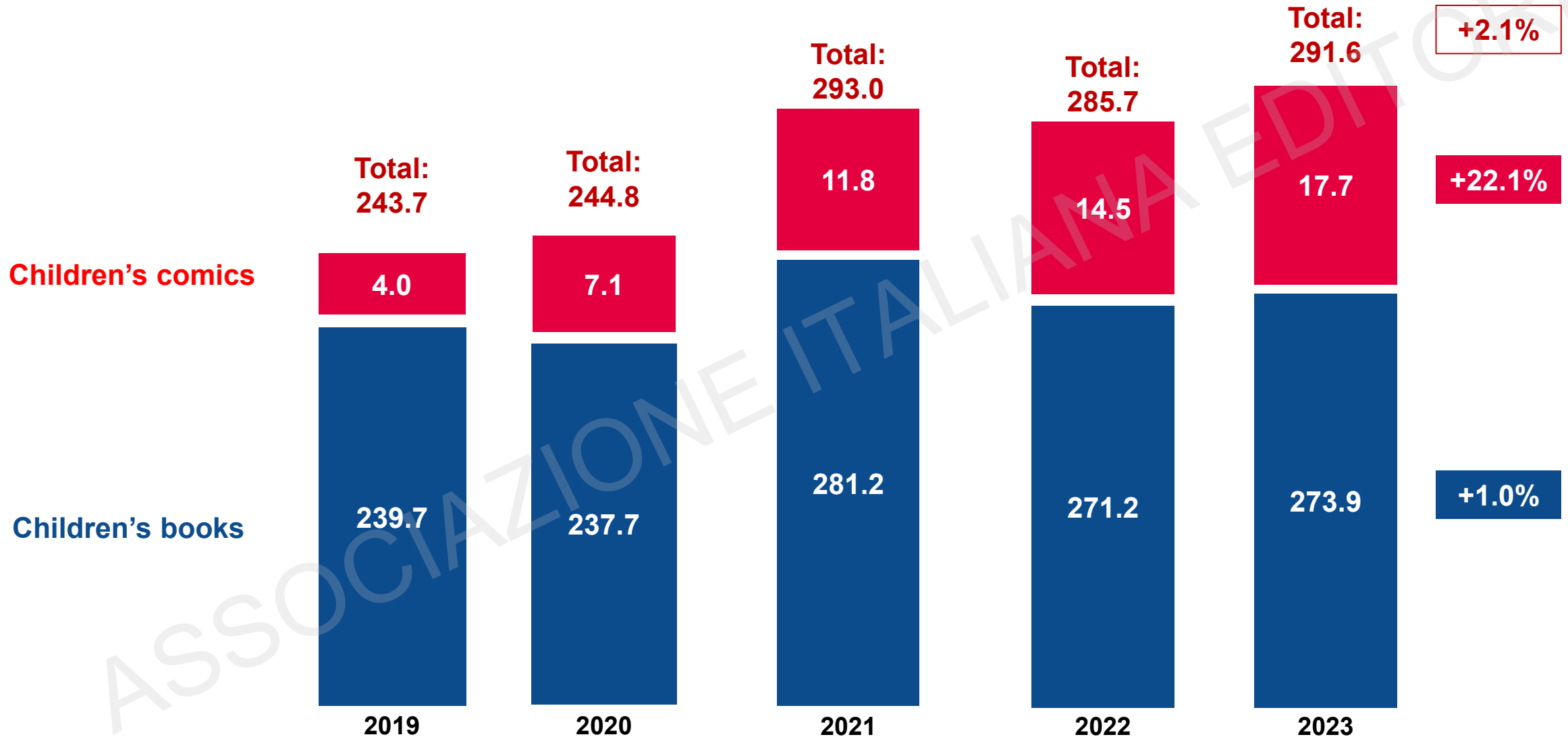
Composition of children's book market (copies): 2019-2023

Copies (millions). Print books only. % are related to 2019



Not only children's books: the role of children's comics

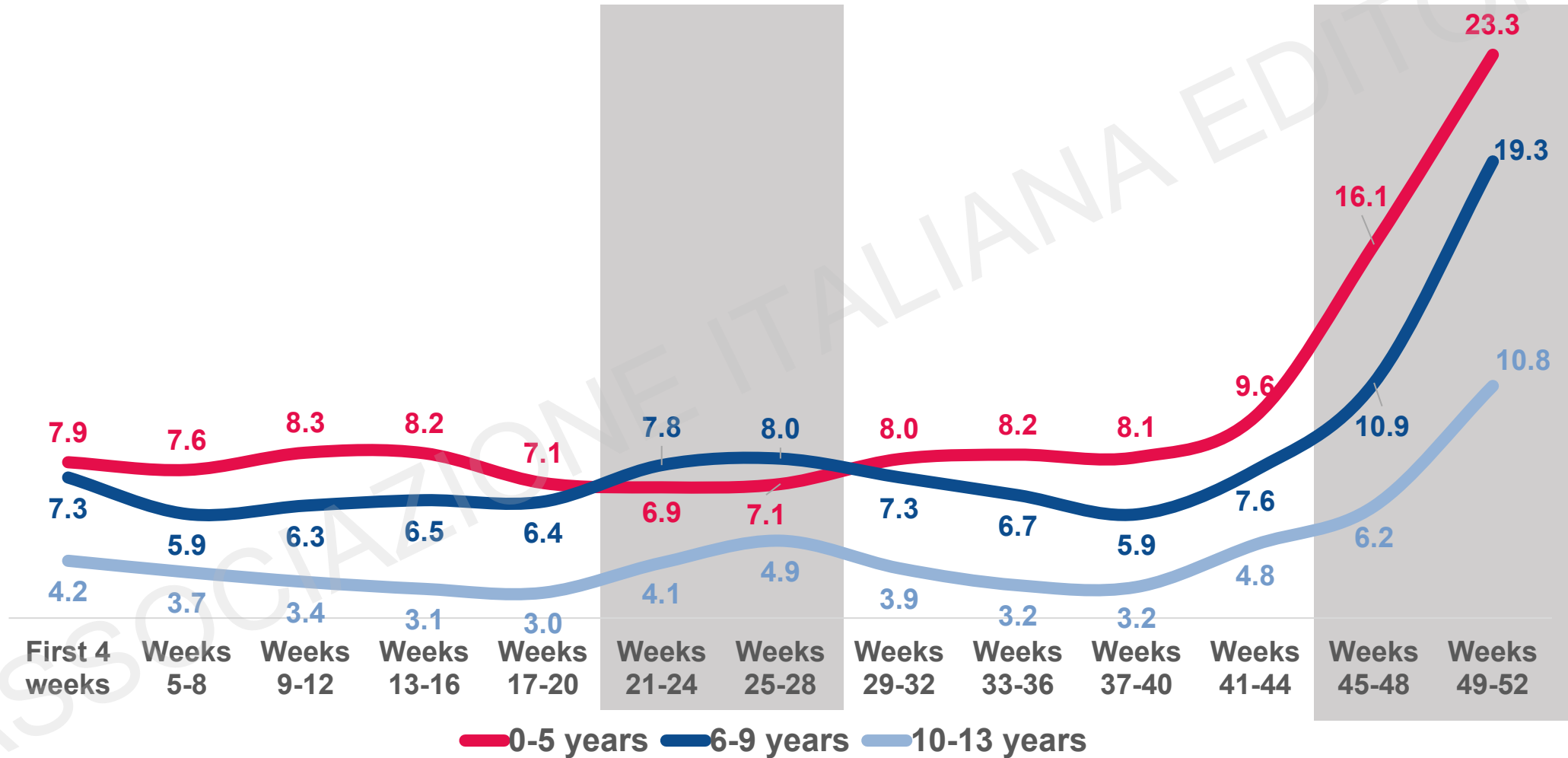
Turnover (million euros). Non scaled



Sales trend of children's books: 2023.

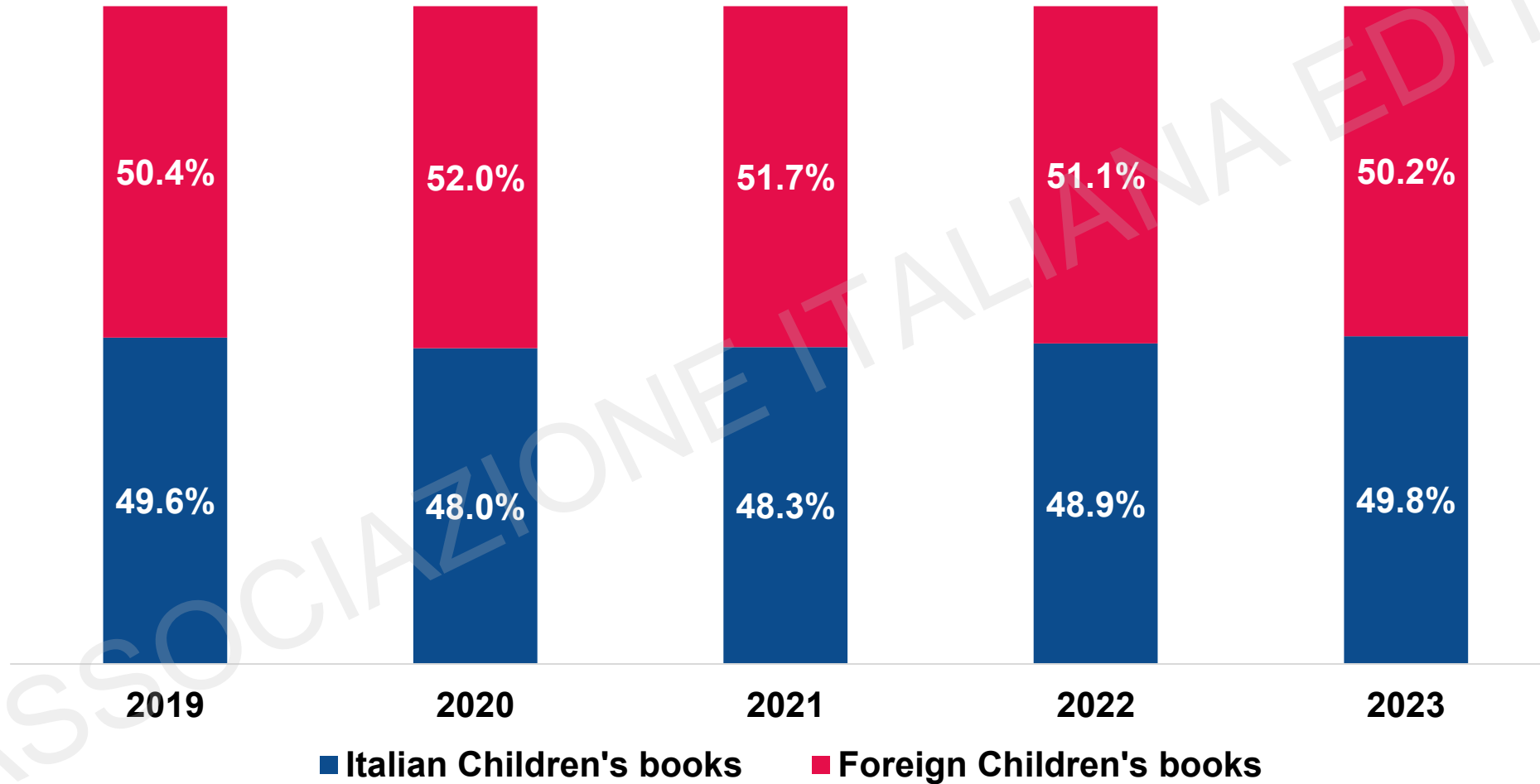
The importance of the holidays

Turnover (million euros) – print books only

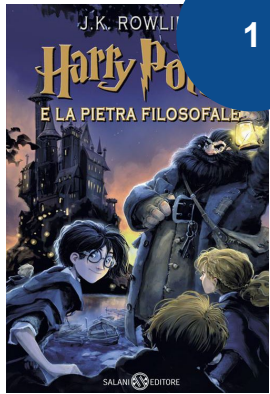


Italian and foreign authorship in children's book market: 2019-2023

Turnover (million euros) - Print books only - Values as %



2023 children's book chart: foreign authors



1

Harry Potter e la pietra filosofale,
J. K. Rowling, Salani
(January 2020)



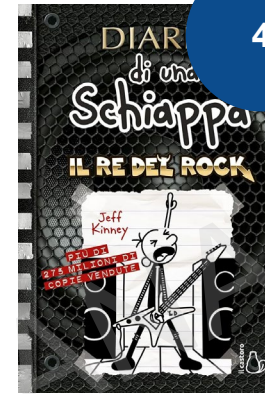
2

Harry Potter e la camera dei segreti,
J. K. Rowling, Salani
(January 2020)



3

Il Piccolo Principe. Ediz. illustrata,
Antoine de Saint-Exupéry,
Bompiani (November 2014)



4

Diario di una schiappa. Il re del rock,
Jeff Kinney, Il Castoro
(October 2023)



5

Il Piccolo Principe.
Antoine de Saint-Exupéry,
Newton Compton
(January 2015)



6

Diario di una schiappa. Bel colpo!,
Jeff Kinney, Il Castoro
(October 2022)



7

Harry Potter e il prigioniero di Azkaban,
J. K. Rowling, Salani
(January 2020)



8

Harry Potter e il prigioniero di Azkaban. Ediz. papercut
J. K. Rowling, Salani
(October 2023)



9

Harry Potter e il calice di fuoco,
J. K. Rowling, Salani
(January 2020)



10

I colori delle emozioni.
Ediz. A colori,
Anna Llenas, Gribaudo
(April 2017)

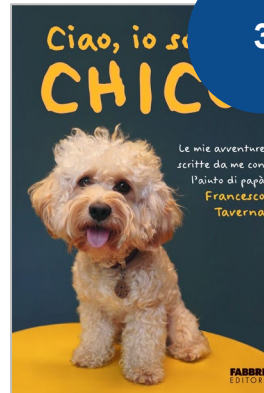
2023 children's book chart: Italian authors



Il mio primo dizionario.
R. Mari, Giunti
(January 2021)



Per questo mi chiamo Giovanni.
L. Garlando, Rizzoli
(May 2022)



Ciao, io sono Chico
F. Taverna, Fabbri
(October 2023)



Il Devoto-Oli junior,
G. Devoto, G.C. Oli, Le Monnier
(July 2022)



Le cinque porte.
M. Corona, Mondadori
(April 2023)



La sfida contro il tempo,
Ninna e Matti, Nord-Sud
(September 2022)



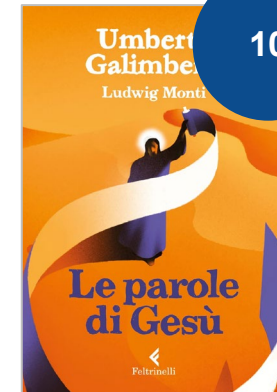
Io gomitolò, tu filo. Ediz. a colori,
A. Pellai, De Agostini
(October 2021)



La notte dei sogni,
MammaGiulia e FigliaChiara,
Nord-Sud
(November 2022)



Il libro dei mostri,
Lyon, Magazzini Salani
(November 2022)



Le parole di Gesù,
U. Galimberti, L. Monti,
Feltrinelli
(April 2023)

Conclusions

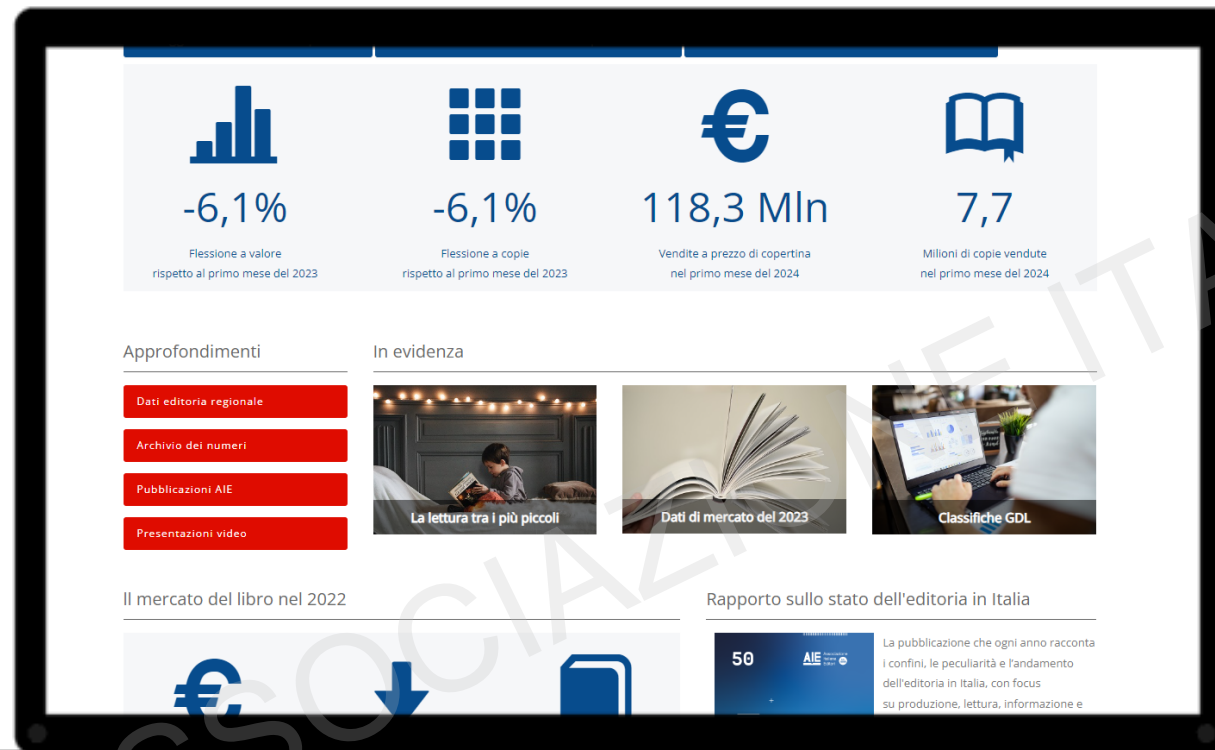
Conclusions

- **Publishing in Italy is a dynamic industry;**
- **Open to the international market, particularly in import/export of translation rights;**
- **Children's books develop a key role.**



Presentations, data and more are also available in the *Studi e ricerche* (studies and researches) section of AIE's website:

aie.it/studiericerche



- Monthly update on publishing market data
- Researches and presentations, also unpublished before
- Video presentations
- Publications
- **Report on Publishing in Italy 2023**
(Available in the main online stores)

Check out the English version highlights on the Giornale della libreria website – the house organ of the Italian Publishers Association:
<http://www.giornaledellalibreria.it/presentazioni.html>



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Thank you

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ROOTS IN THE FUTURE

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Frankfurt Book Fair