

From crisis to recovery

The Italian publishing market from January 2020 to the end of September
And a look back at 2019

Source: Elaboration of Nielsen data
by AIE research dept

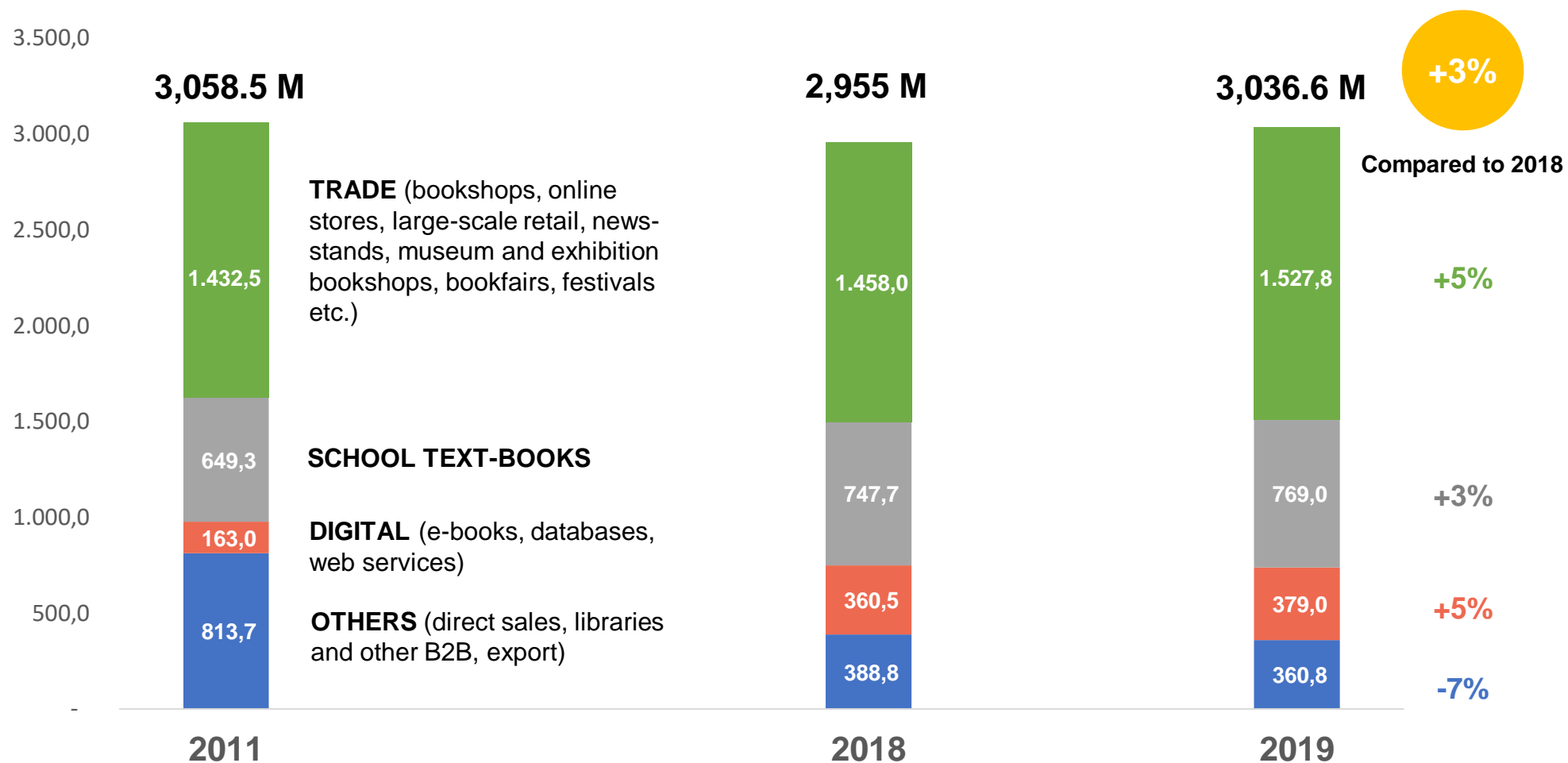
14.10.2020

How did sales go in 2019?

From the Report on the state of publishing in Italy

Growth in 2019: back to 2011 pre-crisis levels

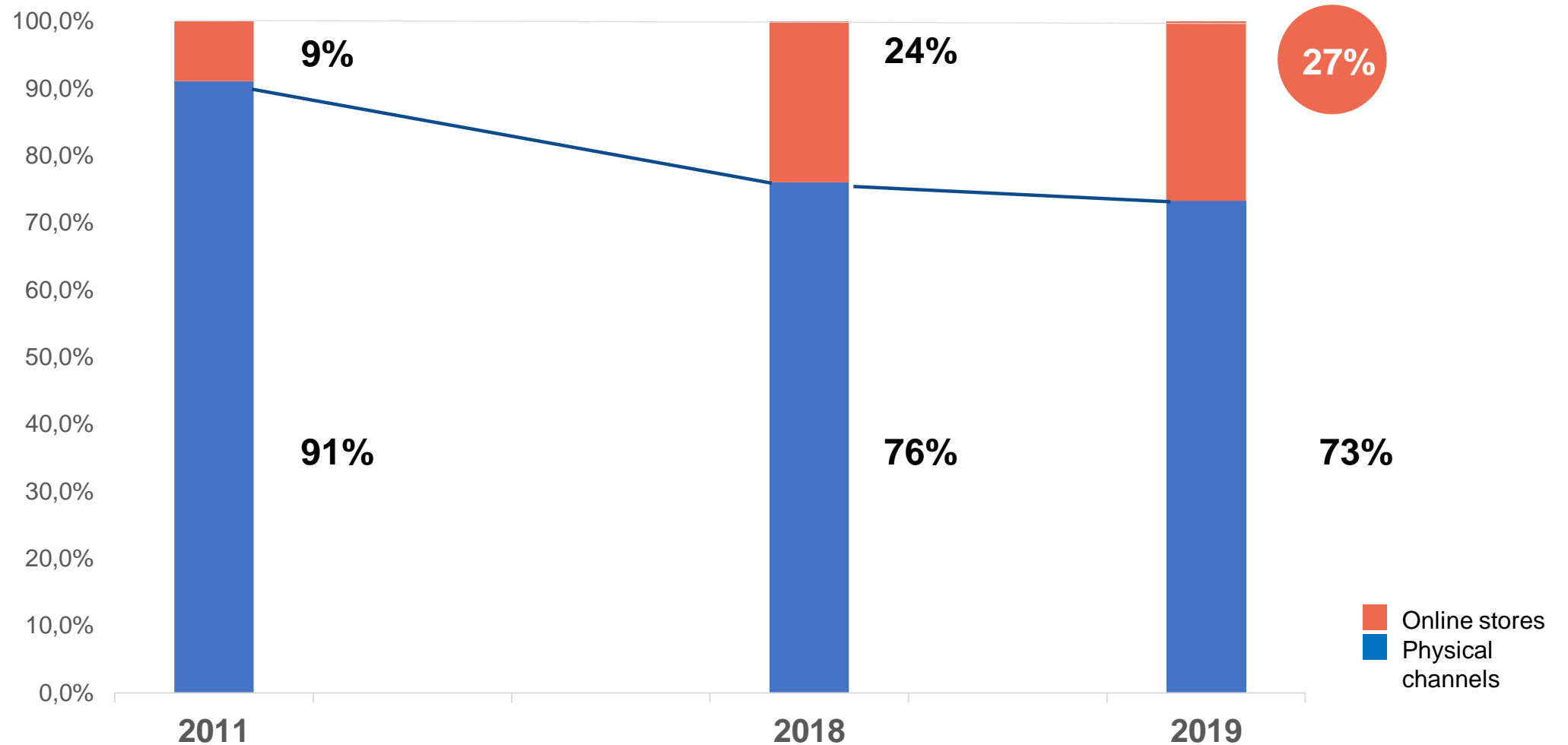
(values in millions euros)



Source: estimates by AIE research dept

Sales channels in 2019: online up to 27%

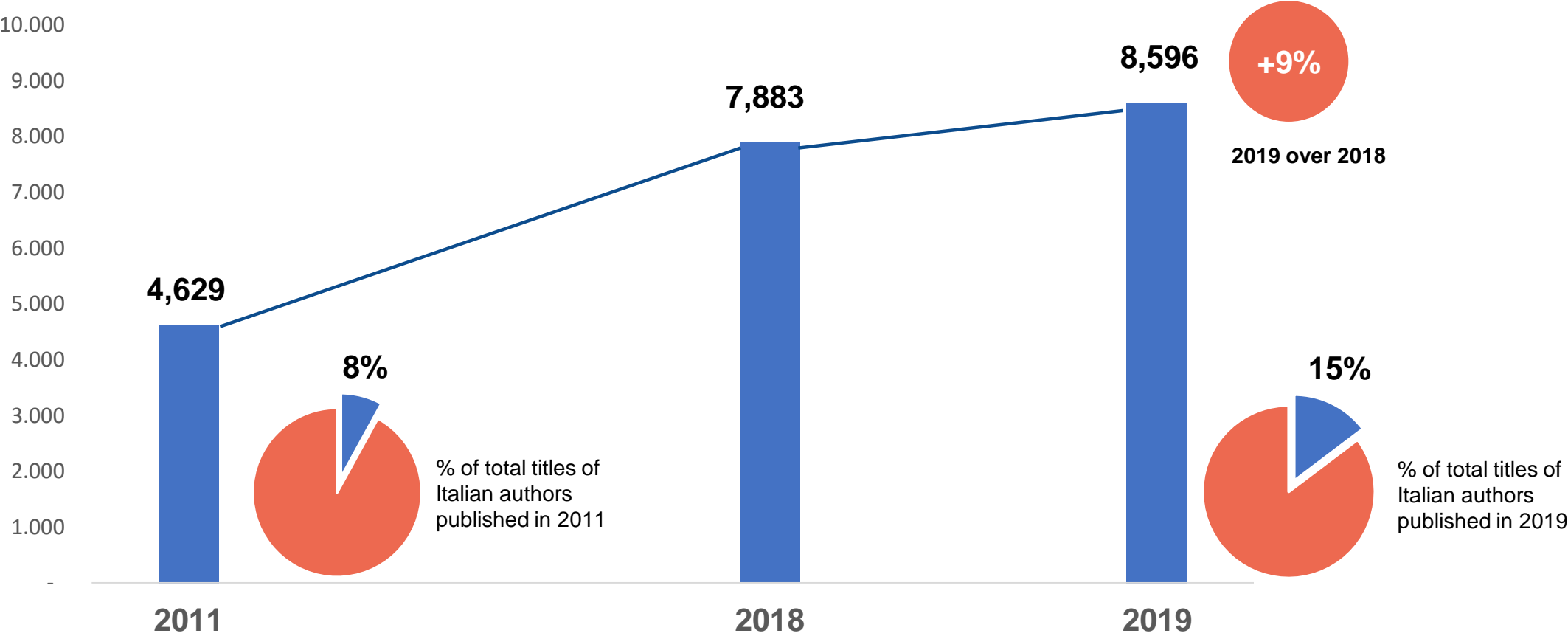
Market share comparison between online and physical channels (bookshops and large-scale retail)



Source: estimates by AIE research dept

In 2019 further growth in export of translation rights of Italian books

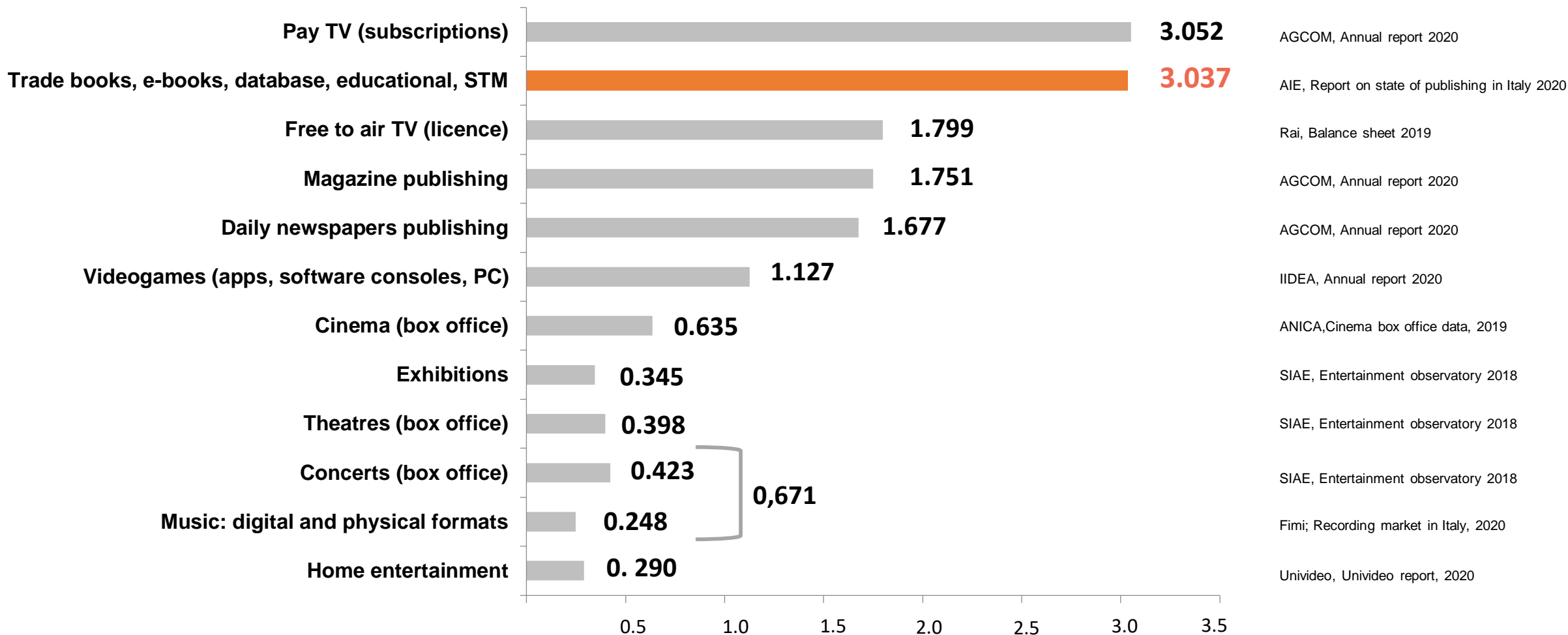
Number of Italian titles whose rights were sold to foreign publishers



Source: estimates by AIE research dept

In 2019, the book industry confirmed as the largest Italian cultural industry, together with pay TV

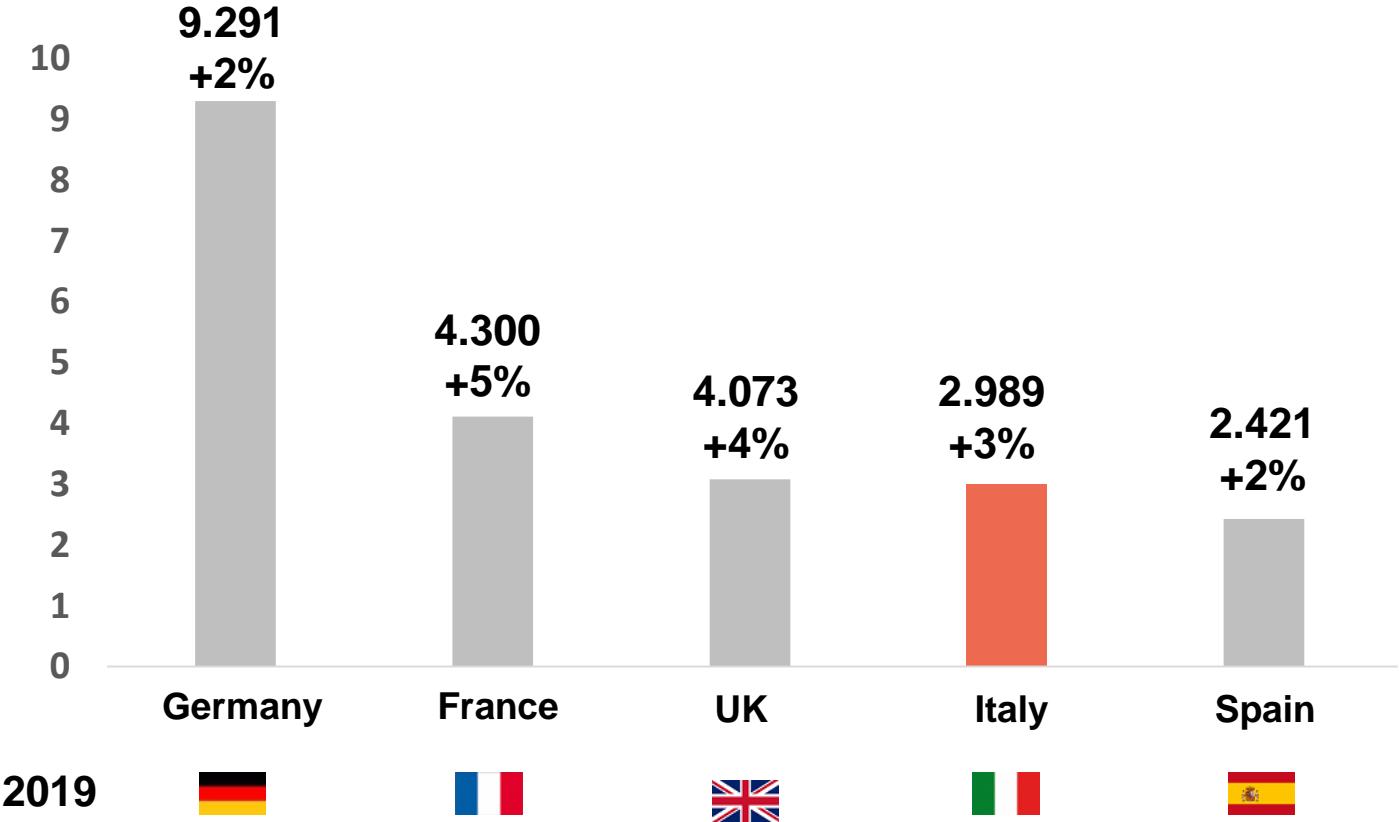
Sources



Sales to consumers in billions of euros, net of advertising and public grants

Italian publishing in 2019 compared to other European countries

(values in billions euros at cover price, compared to previous year; excluding export)



Source: estimates by AIE research dept

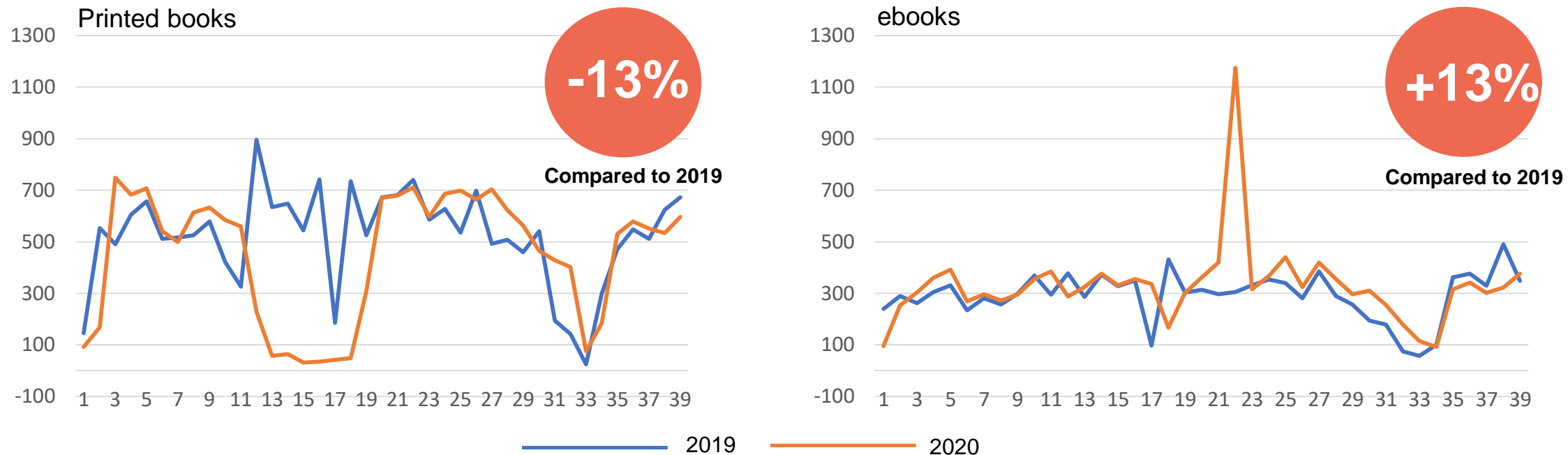
2020

Trade publishing recovers after lockdown

Market data in first nine months of 2020

Recovery in production of printed books, record for ebooks

Comparison between number of titles published weekly in 2019 and 2020



Weeks 11-18 (9 March– 3 April 2020)	-77%
Weeks 22-39 (25 May– end of September)	+11%
Weeks 24-39 (8 giugno-27 settembre)	+13%
Weeks 1-39 (30 December 2019 – end of September)	-13%

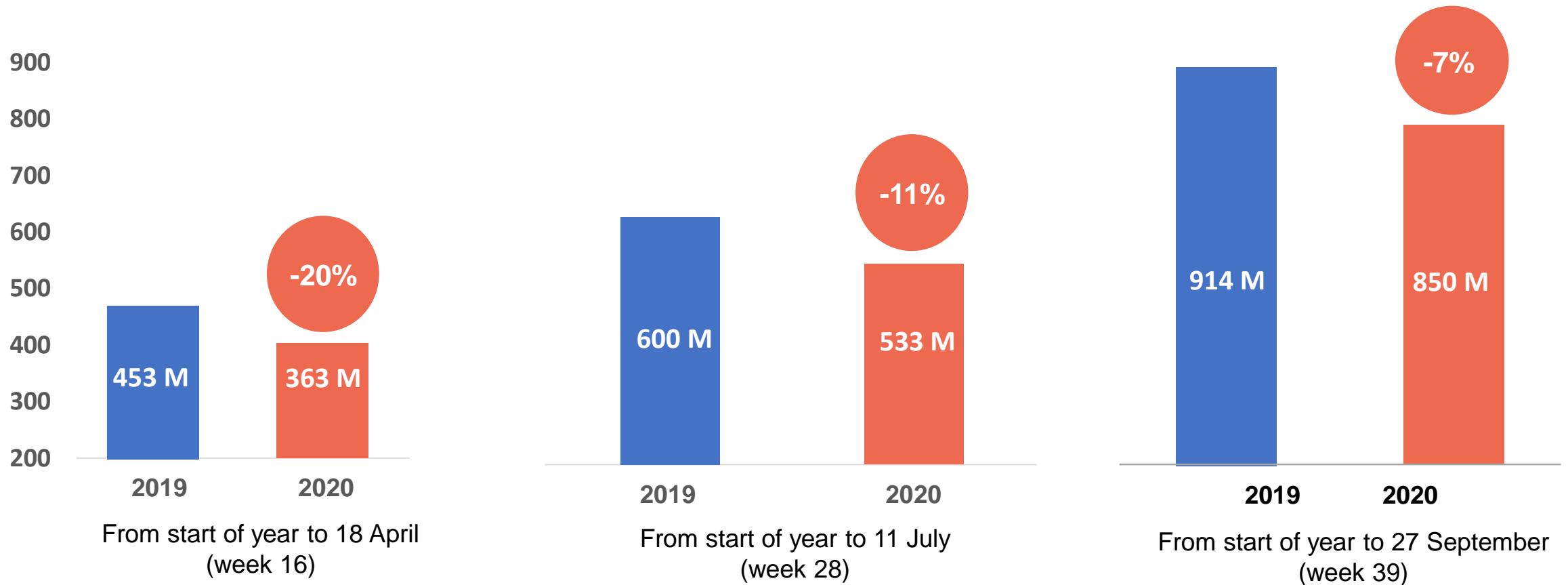
Weeks 11-18 (9 March– 3 April 2020)	+1%
Weeks 22-39 (25 May– end of September)	+25%
Weeks 24-39 (8 June– end of September)	+9%
Weeks 1-39 (30 December 2019– end of September)	+13%

Source: Catalogue of Italian books on sale and Catalogue of Italian e-books on sale (e-Kitab)

Sales recovery continues from July to September

Comparison of market trends in trade channels on 18 April, 11 July and 27 September with respect to previous year

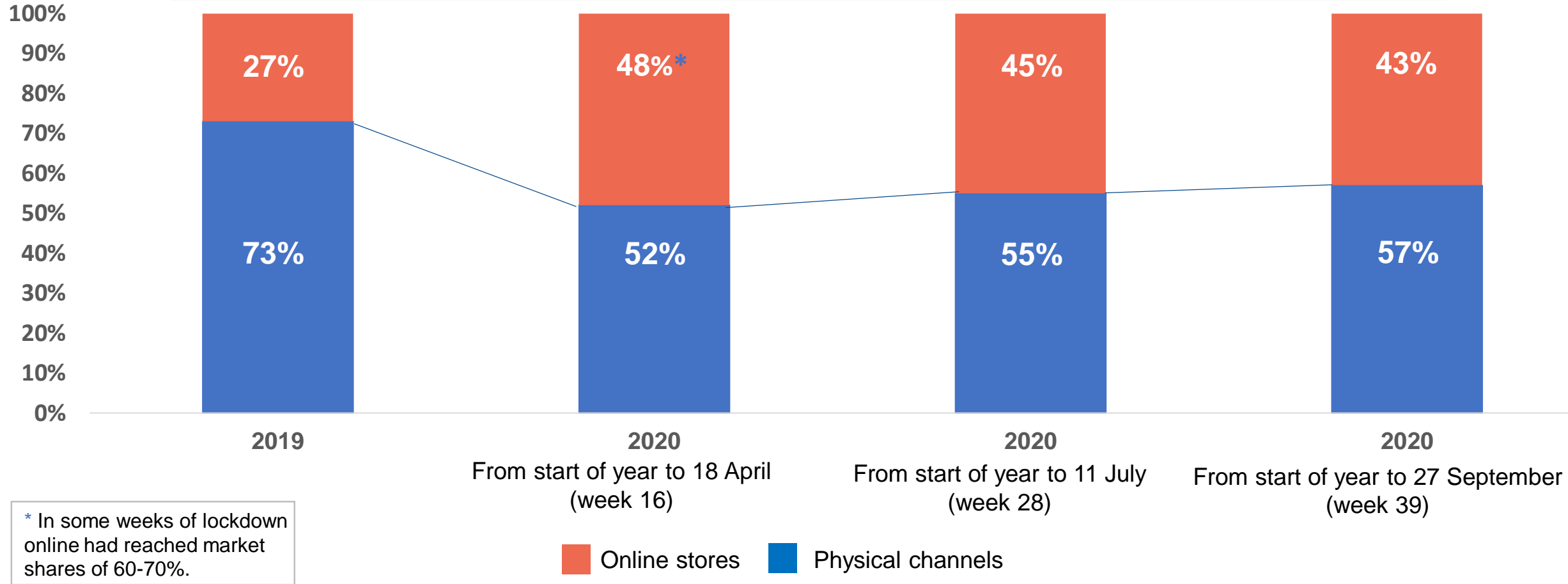
(values in millions euros; AIE estimate for Amazon)



Elaboration of Nielsen data by AIE research dept

e-commerce grows during the lockdown, physical channels gradually recover after reopening

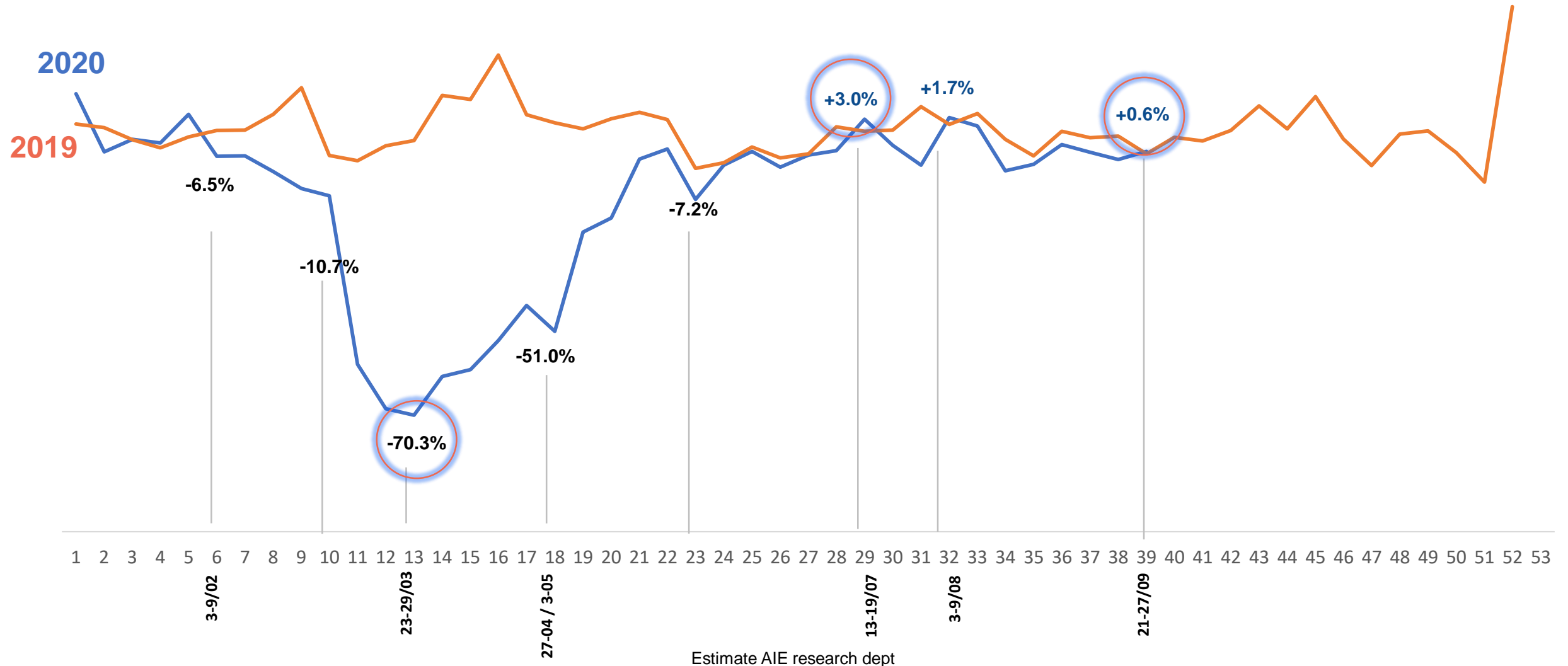
Market share of online bookshops vs. physical channels (bookshops and large-scale retail)



Estimates by AIE research dept based on Nielsen data

Recovery continues in bookshops: from mid-June a return to 2019 levels

Trend in weekly sales in physical bookshops and in online stores belonging to Arianna+: comparison 2019-2020
(not including Amazon and large scale-scale retail)



Estimate AIE research dept

September is the first completely positive month in 2020 for bookstores belonging to Arianna+

(Net of Amazon and large-scale retail)



+0.3%

Source: iBuk



In the framework of

