

# The status of books in Italy and Europe in the year of the pandemic

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Scuola per librai Umberto ed Elisabetta Mauri

# The European book: global leadership

**The European publishing market is worth 36-38 billion euro.**  
**6 of the 10 major international publishing groups are European.**  
**4 of the *Big 5* in the USA are also European.**

Rank	Publishing Company (Group or Division)	Country Mother Corporation	Revenues 2019 (MI EUR)
1	RELX Group (Reed Elsevier)	UK/NL/US	5,025
2	ThomsonReuters	Canada	4,704
3	Pearson	UK	4,553
4	Bertelsmann	Germany	3,704
5	Wolters Kluwer	NL	3,544
6	Hachette Livre	France	2,384
7	Springer Nature	Germany	1,718
8	Wiley	US	1,605
9	HarperCollins	US	1,564
10	Scholastic (corp.)	US	1,475

Source: AIE Research Office based on Wischenbart data – Content&Consulting ([Global 50 The World Ranking of the Publishing Industry 2020](#))

# Market performance in some European countries in 2020

Trade segment calculated on the cover price without ebooks and audiobooks

<b>France</b>	<b>-2%</b>	<b>Netherlands</b>	<b>+7%</b>
<b>Spain</b>	<b>+1%</b>	<b>Portugal</b>	<b>-19%</b>
<b>Germany</b>	<b>-2,3%</b>	<b>Finland</b>	<b>+2%</b>
<b>UK</b>	<b>+5,5%</b>		

## Market trend factors in the various countries:

- weight of the online channel
- opening of the bookshops in the last lockdown
- Christmas sales

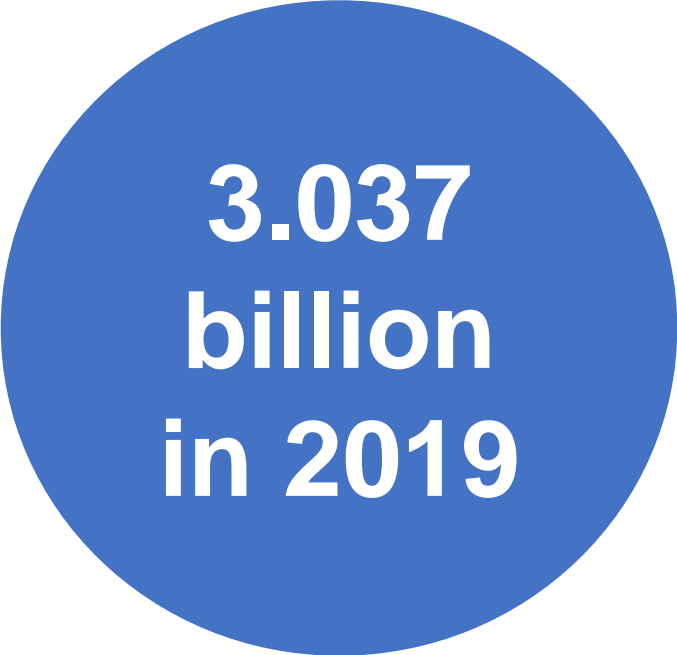


Source: AIE Research Office based on FEP data

# And Italy?

# Italian publishing ranks fourth in Europe and is the top cultural industry in Italy.

Whole publishing sector calculated on the cover price: trade, educational, professional, digital, export



**3.037  
billion  
in 2019**

# Sales of trade publishing increased in 2020

Trend in value compared to the previous year



**+0.3%**

Source: Calculation by AIE Research Office based on data from Nielsen and other operators

# The growth experienced was much stronger if we also consider ebooks and audiobooks

Trend in value compared to the previous year

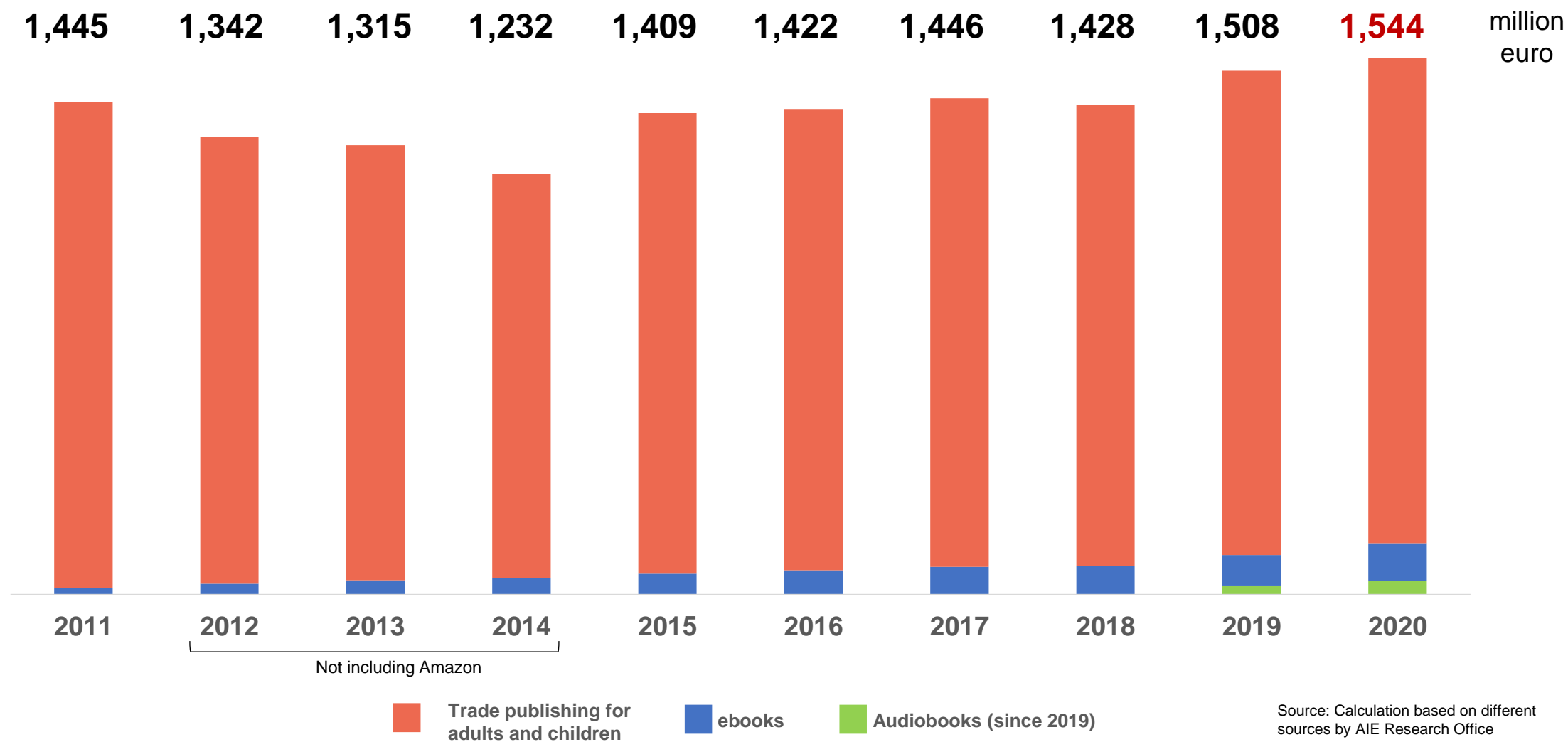


+2.4%

Source: Calculation based on different sources by AIE Research Office

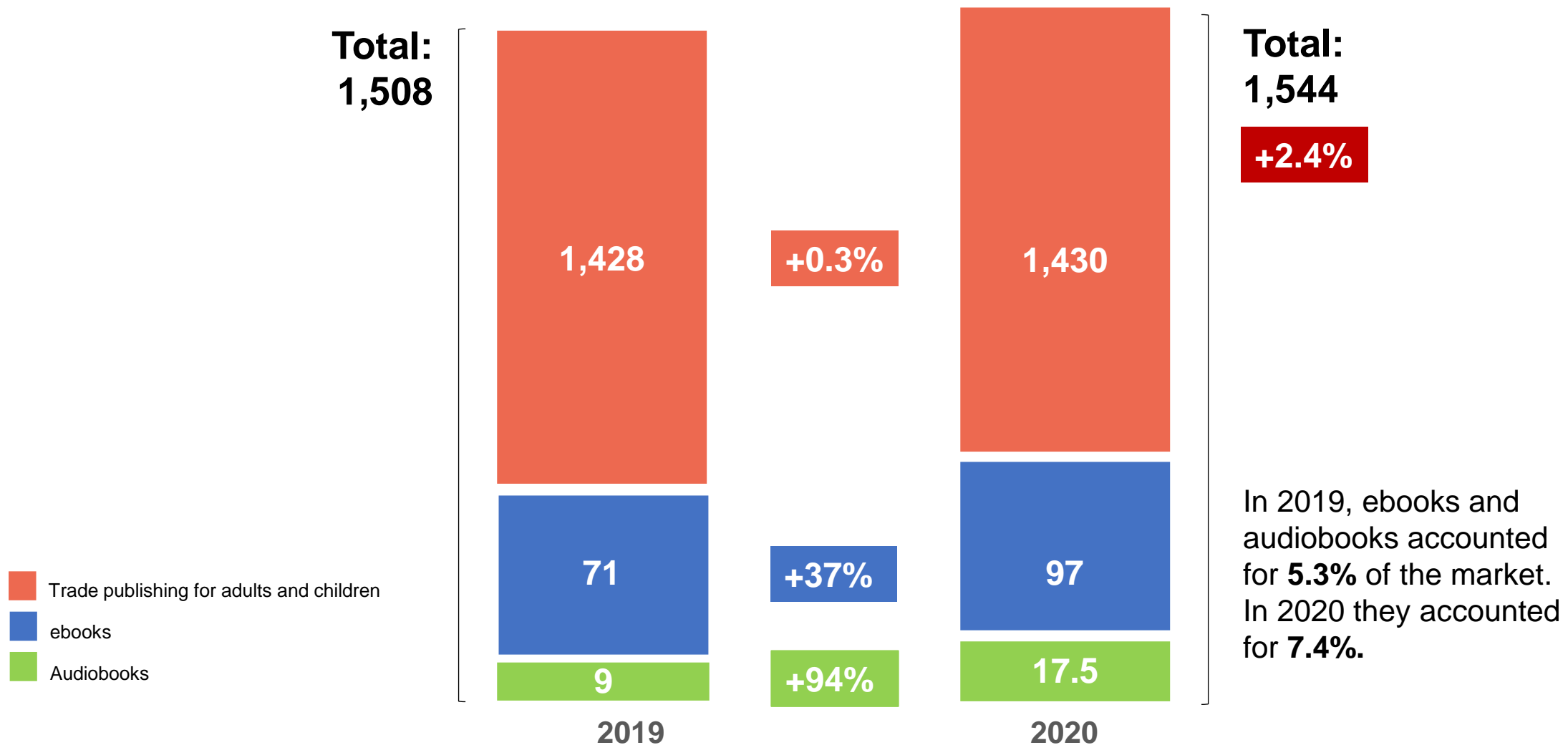


# Trend in value of trade books, ebooks and audiobooks from 2011 until today



# From 2019 to 2020: value-based trend

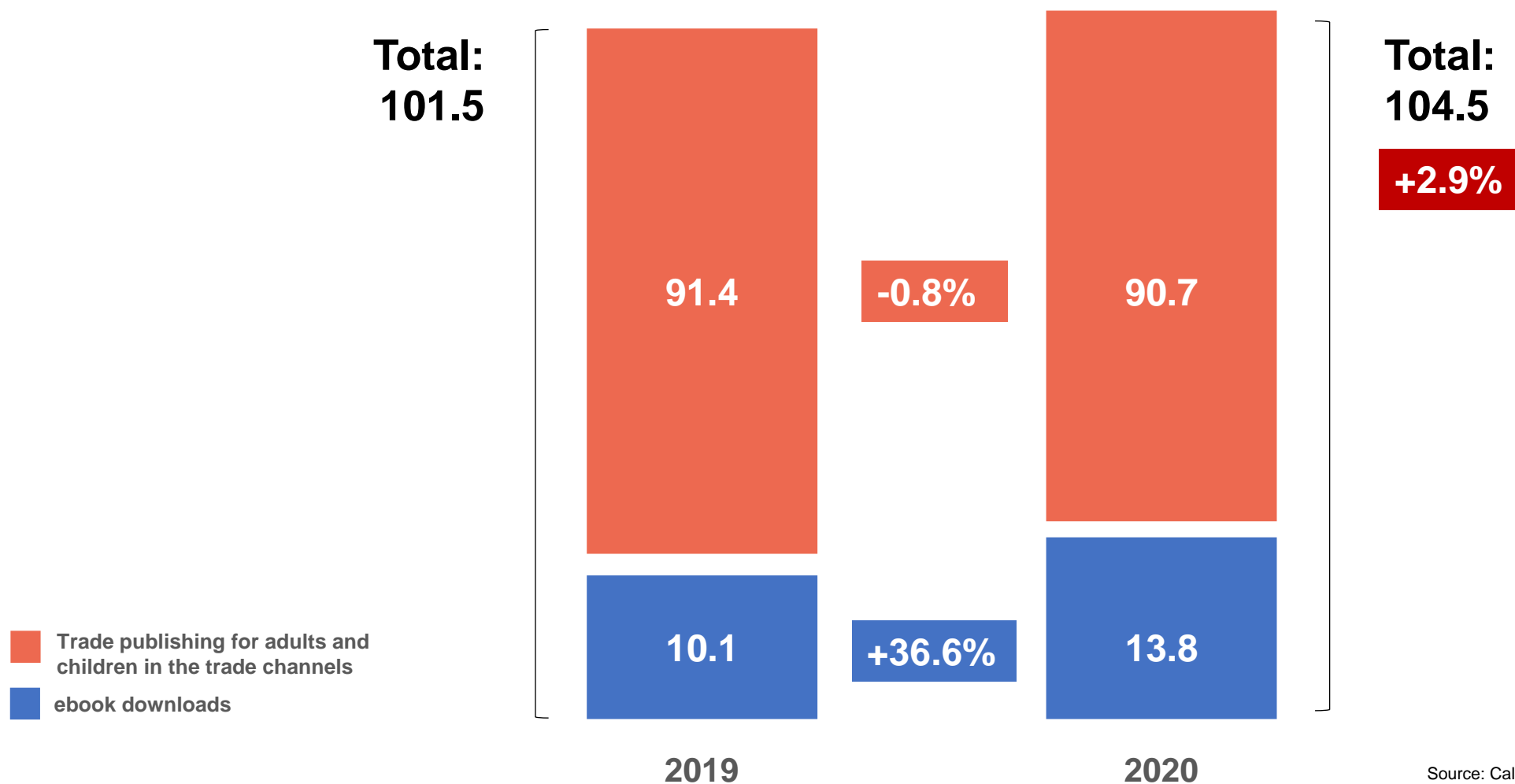
Values in millions of euro and in %



Source: Calculation based on different sources by AIE Research Office

# From 2019 to 2020: copy-based trend

Values in millions of euro and in %

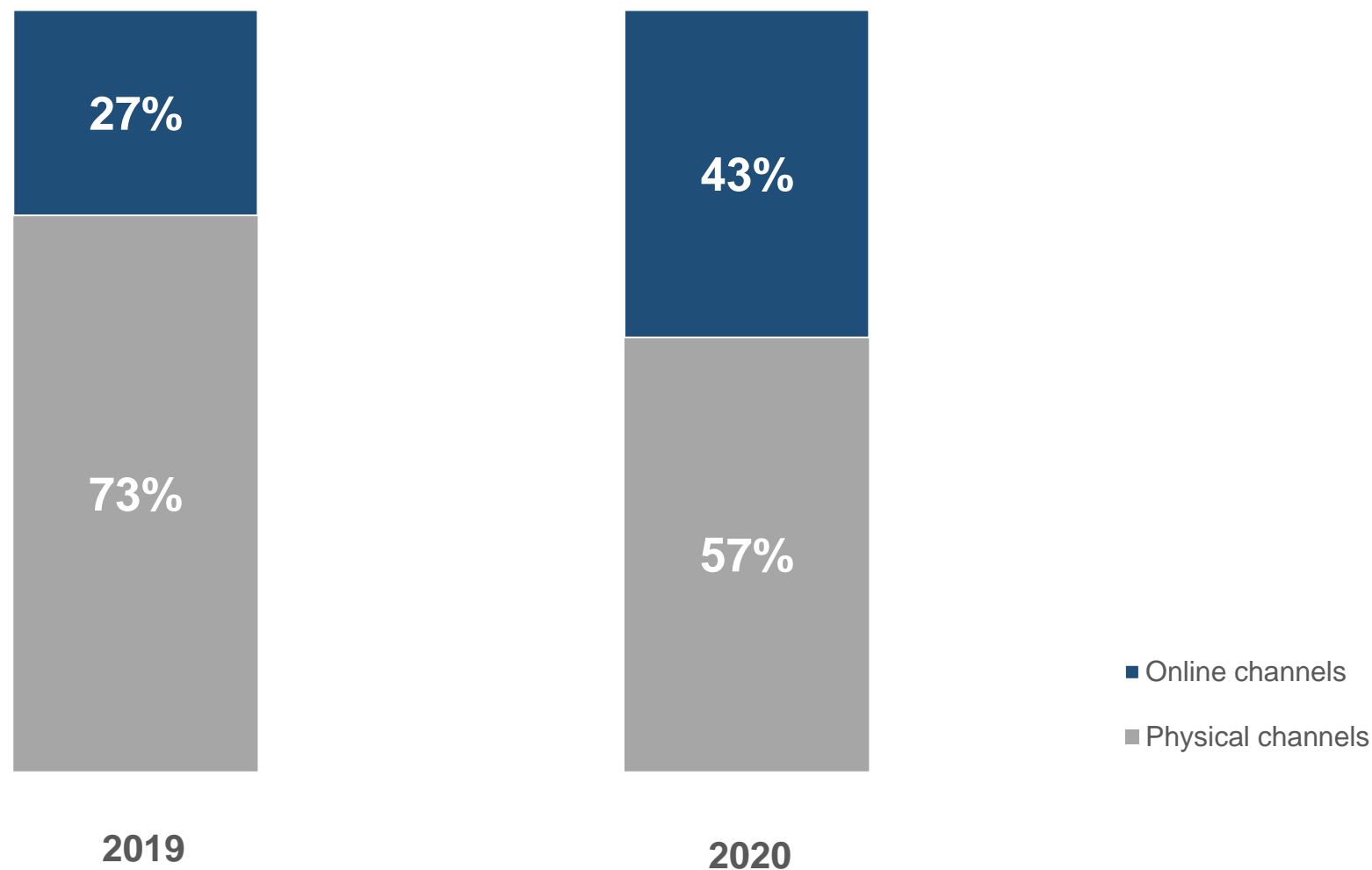


Source: Calculation by AIE Research Office based on data from Nielson and other operators.

# From 2019 to 2020: physical channels decrease, e-commerce boom

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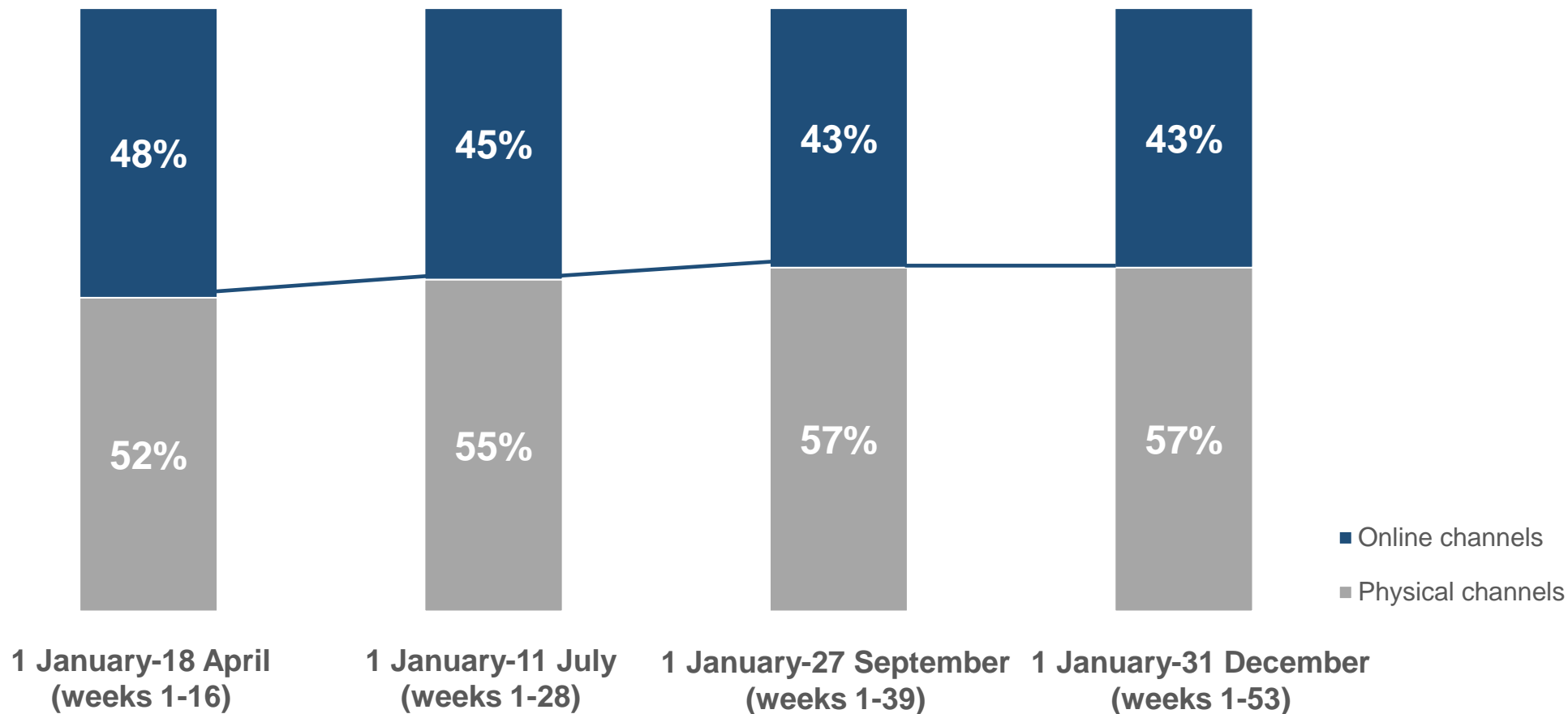
Values in %



Source: AIE Research Office

# During 2020 the recovery of the physical channels after the first lockdown

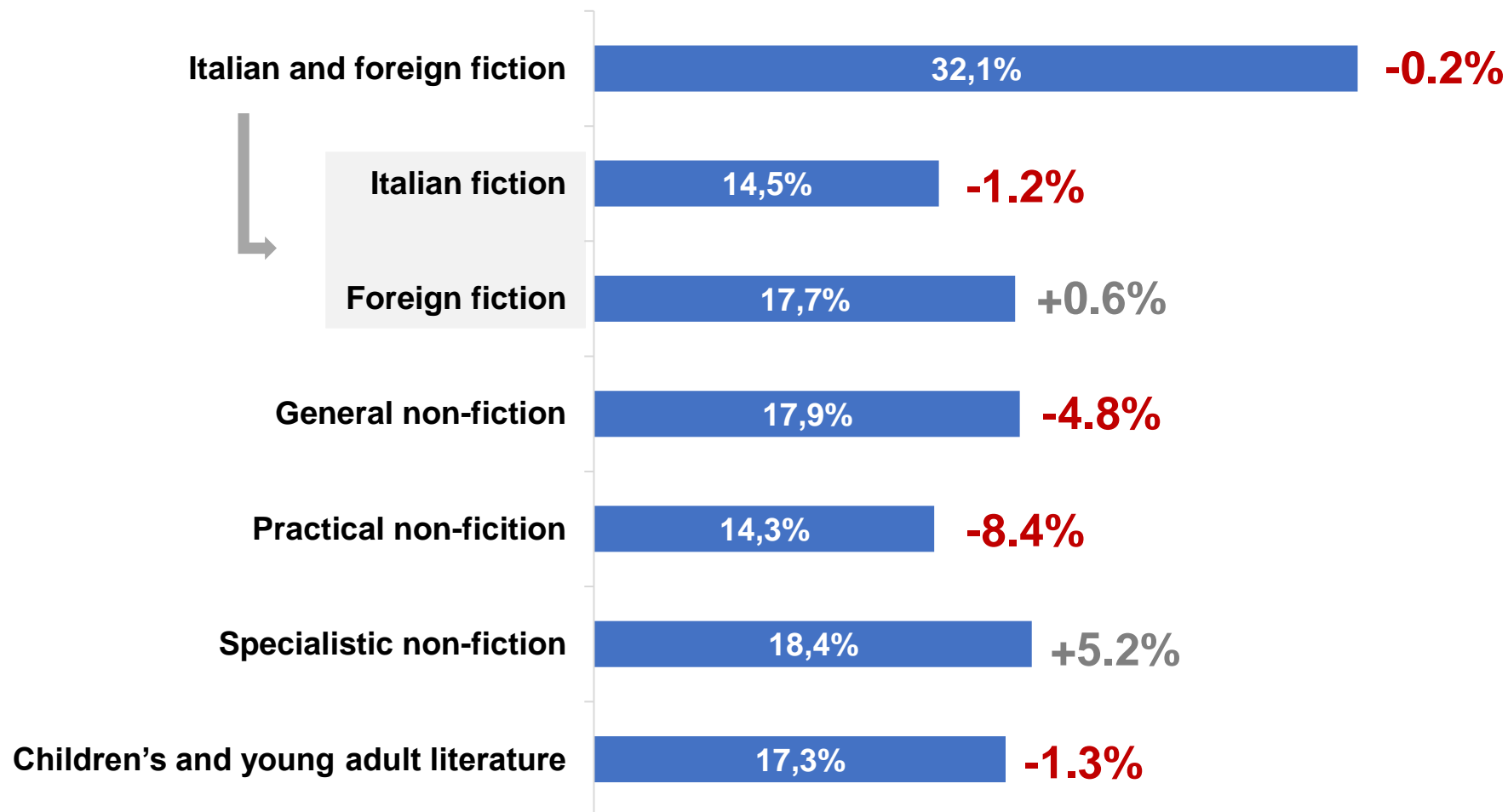
Values in %



Source: AIE Research Office

# How genres changed in 2020

Market shares and variation in value compared to the previous year



Source: AIE Research Office based on Nielsen data

## Scholastic, university and professional publishing: a first glance at 2020

- For **educational** publishing it was a year that required extraordinary commitment to sustain distance learning with books, supplementary digital contents and advanced services. The limited renewal of textbook choices caused by the closure of the schools had a strong impact.
- For **academic** publishing, the year was essentially positive thanks to the reduction in piracy (photocopies) and the key role played by books in distance learning.
- For **professional legal** publishing, 2020 was a difficult year due to the closure of the courts.

## In conclusion, 2020 was a year with highlights:

- Ability of publishers to remodulate their publishing schedule, propose new authors and titles, reorganise the processes
- The extraordinary work of the bookshops
- Measures adopted by the Government and by Parliament:
  - consideration of the book as an essential asset and therefore the opening of the bookshops, even during the lockdowns;
  - support for public demand (30M in funding to libraries for purchasing books in bookshops) and private demand (196M: 18App, family card) and direct aid (40M: small publishers, art and tourism publishers, translators)
- Strong synergy and joint efforts made by the associations of publishers, booksellers and libraries



## ... and lowlights:

- Impact of the pandemic, in particular on large bookshops, bookshop chains and those in shopping centres.
- Cancellation of exhibitions and festivals.
- Concentration of sales on a single operator.
- Crisis in the specialist art and tourism publishing segments.
- Significant drop in the professional legal publishing segment.
- Impact of the limited renewal of text book choices in educational publishing.

## Worries about:



The pandemic



The economy and cultural consumption



Politics

**Thanks for your attention**

**We miss Venice so much!**