



BASE YEAR
2019

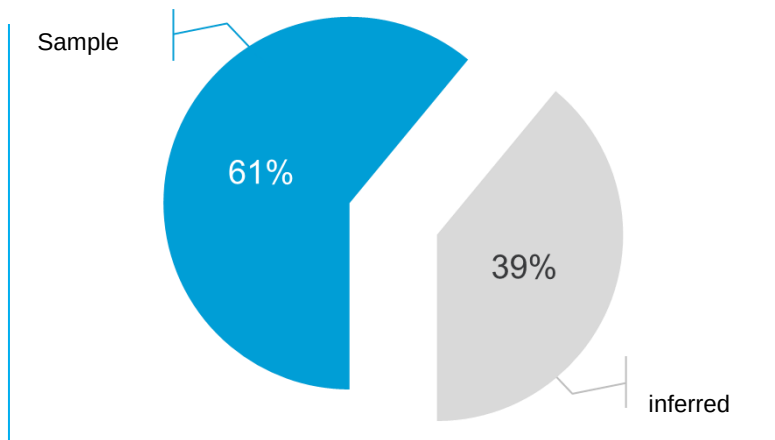


PRODUCTION AND SALES OF THE BRAZILIAN PUBLISHING SECTOR

PRODUCTION AND SALES OF ◆ THE BRAZILIAN PUBLISHING SECTOR



SAMPLE



REPORT PROMOTED BY:



Historical data: <https://snel.org.br/pesquisas/> or <http://cbl.org.br/servicos/>

ABOUT THIS STUDY

This study was conducted by Nielsen Book and coordinated by the National Syndicate of the Book Publishers (SNEL) and the Brazilian Book Chamber (CBL).

Based on data from a sample of publishers, the Production and Sales Research survey aims to annually verify the performance of the sector and its subsectors.

Every year the data from the publishing market are updated based on the verification of this sample.

mercado

Highlights

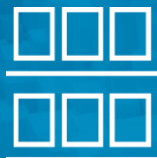
2019

- ◆ The sector presents a **growth** of **7,7%** to the market sales. This data means a **real growth** of **3,3%**, considering the period **IPCA (Brazilian inflation index)** of **4,31%**
- ◆ The subsector of **General Titles** presented the **best results**. In the market sales, the **nominal growth** was **19,8%**, which means a real growth of **14,8%**.
- ◆ **CTP** is the only subsector that presents a nominal decrease. In the market sales the nominal reduction was **4,3%**. In real terms, the reduction is **8,2%**.
- ◆ **Relevant increase** in the participation of some sales channels, as **virtual bookstores**, **internet/marketplace** and **schools/universities**.





PRODUCTION



SALES



CHANNELS



SUBSECTORS



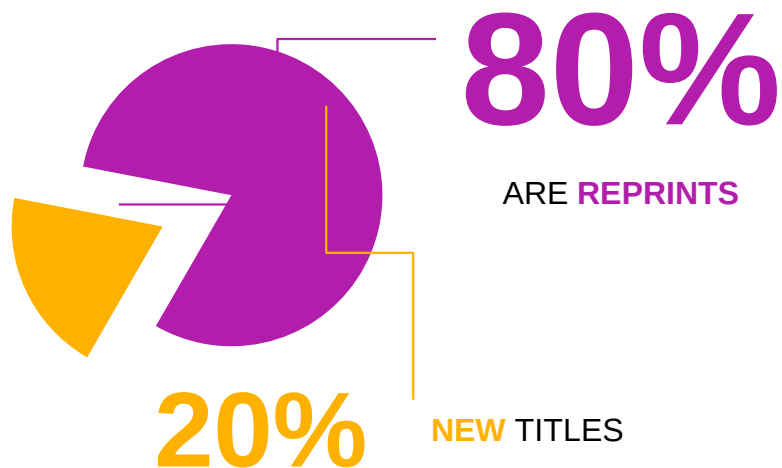
APPENDIX

SECTOR PRODUCTION

IN 2019, THE BOOKSELLER SECTOR
PRODUCED...



395 MILLION COPIES



Production and sales of the Brazilian Publishing Sector
Source: Nielsen | Nielsen Book



50,000

PUBLISHED
TITLES



73%

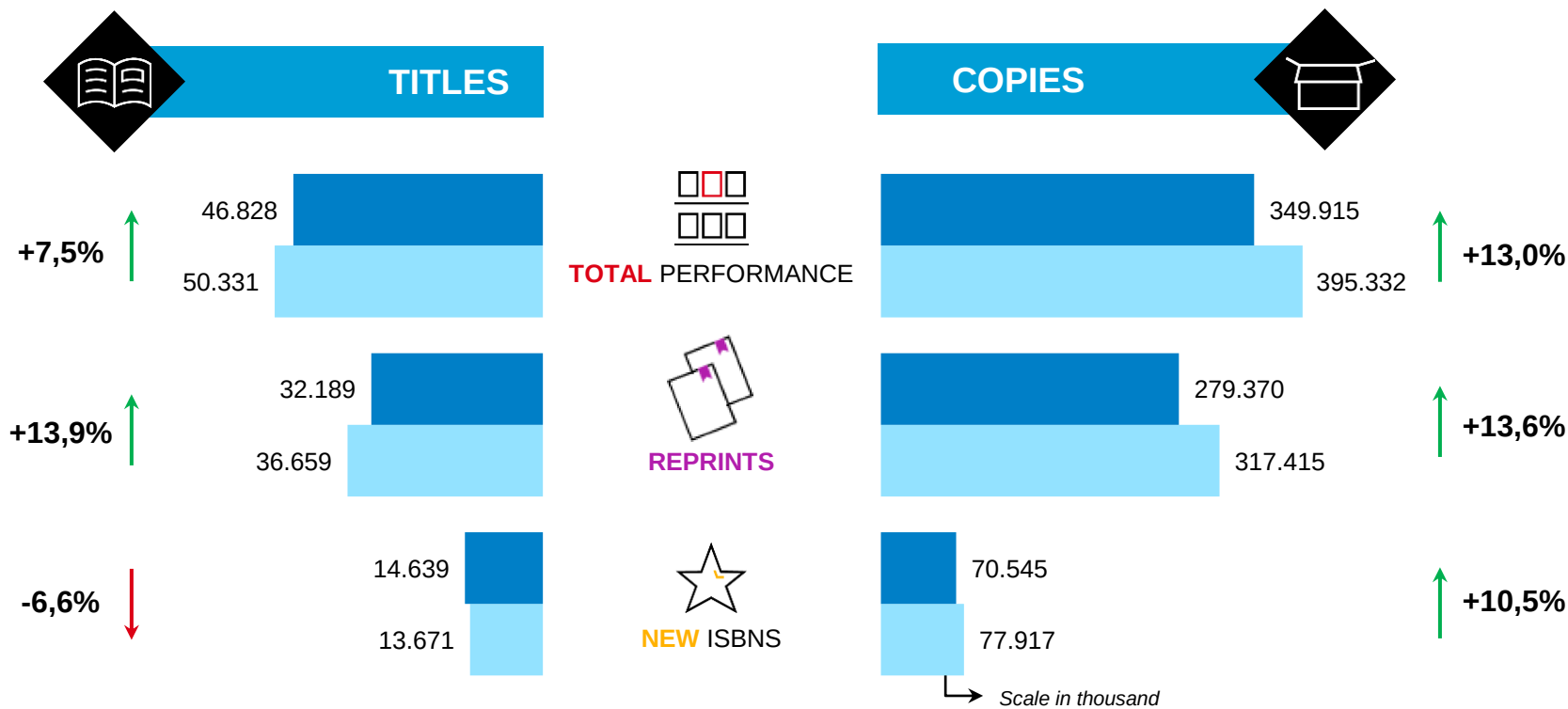
ARE REPRINTS



27% NEW
TITLES

SECTOR PRODUCTION

When compared with the 2018 performance, 2019 presents a growth in the total production



Production and sales of the Brazilian Publishing Sector
Source: Nielsen | Nielsen Book

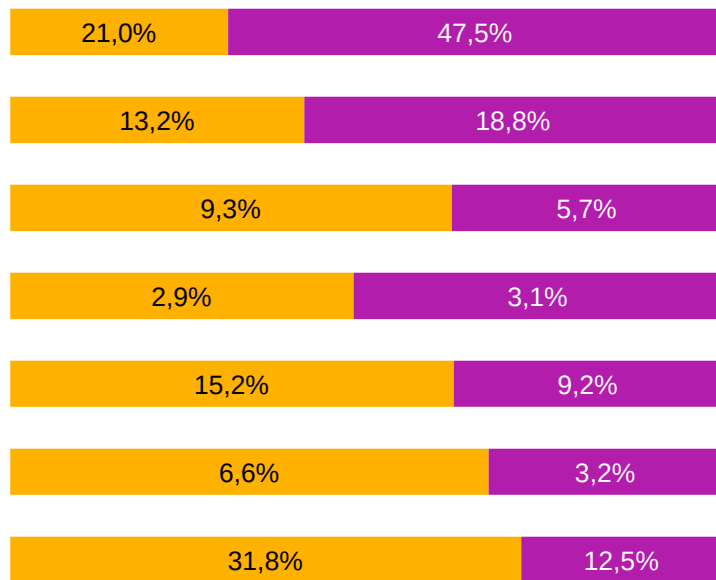
■ 2018 ■ 2019

SECTOR PRODUCTION – BY THEME



PRODUCTION BY SECTOR

Amount



titles copies

COMPARATIVE PERFORMANCE

Total production -titles

Textbooks



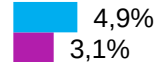
Religion



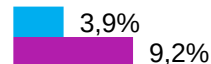
Adult literature



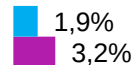
Self-help



Children's Literature



Youth Literature



Others



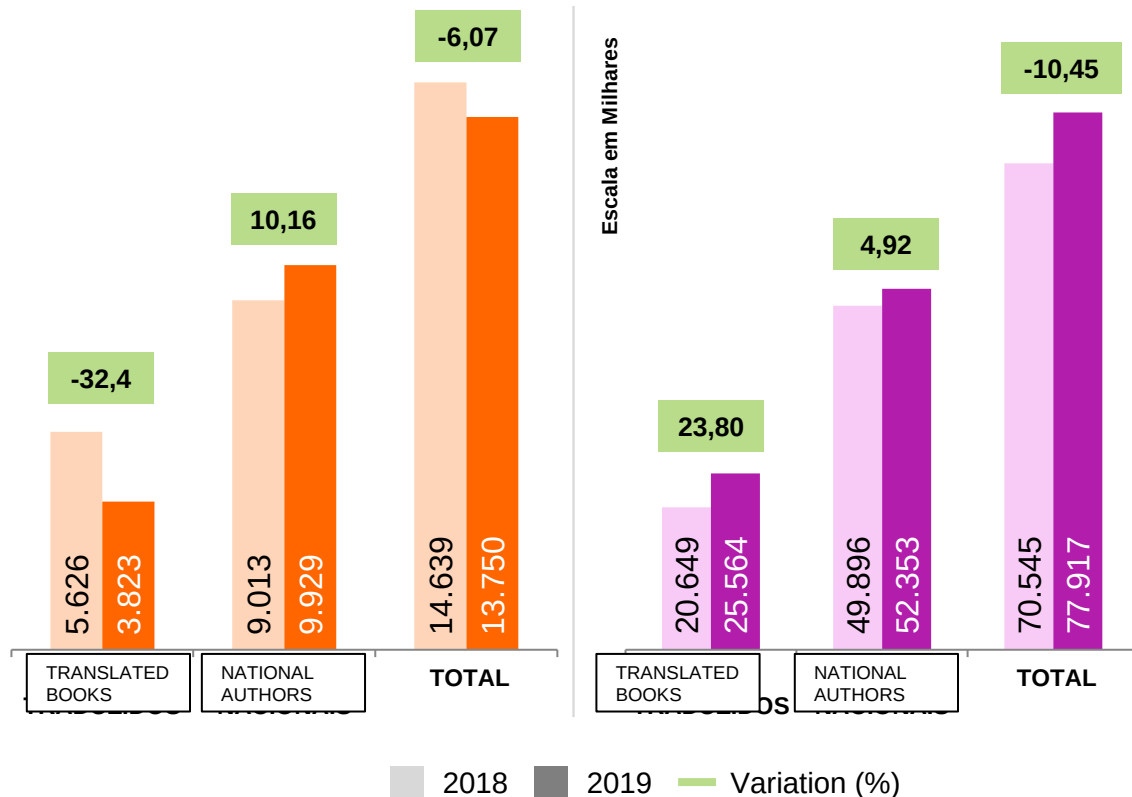
2018 2019

Production and sales of the Brazilian Publishing Sector
Source: Nielsen | Nielsen Book

SECTOR PRODUCTION

TITLES

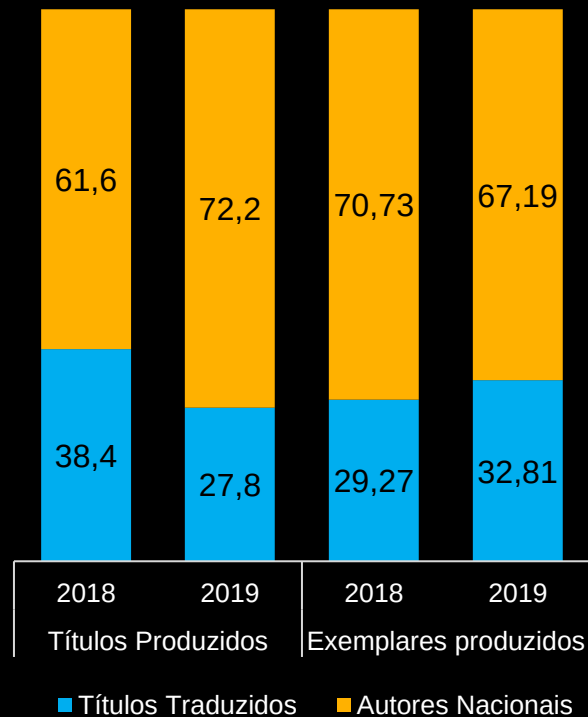
COPIES



TRANSLATION

TRANSLATED TITLES (%) X

NATIONAL AUTHORS (%)





PRODUCTION



SALES



CHANNELS



SUBSECTORS



APPENDIX

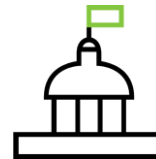
SECTOR SALES



TOTAL



MARKET



GOVERNMENT



COPIES

434 MILLION

209 MILLION

224 MILLION



INCOME

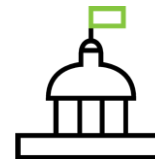
R\$5,7 BILLION

R\$3,9 BILLION

R\$1,6 BILLION

SECTOR SALES

2018 2019 Variação



TOTAL

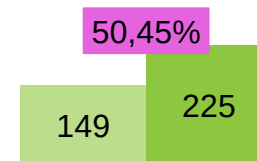
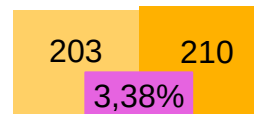
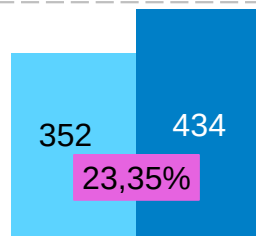
MARKET

GOVERNMENT



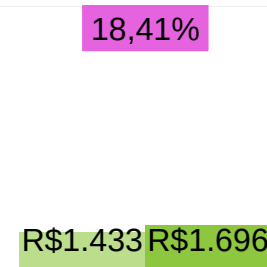
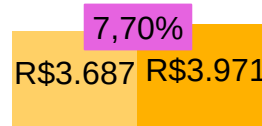
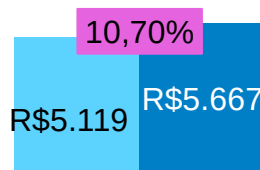
COPIES

Escala em Milhões



TURNOVER

Escala em Milhões

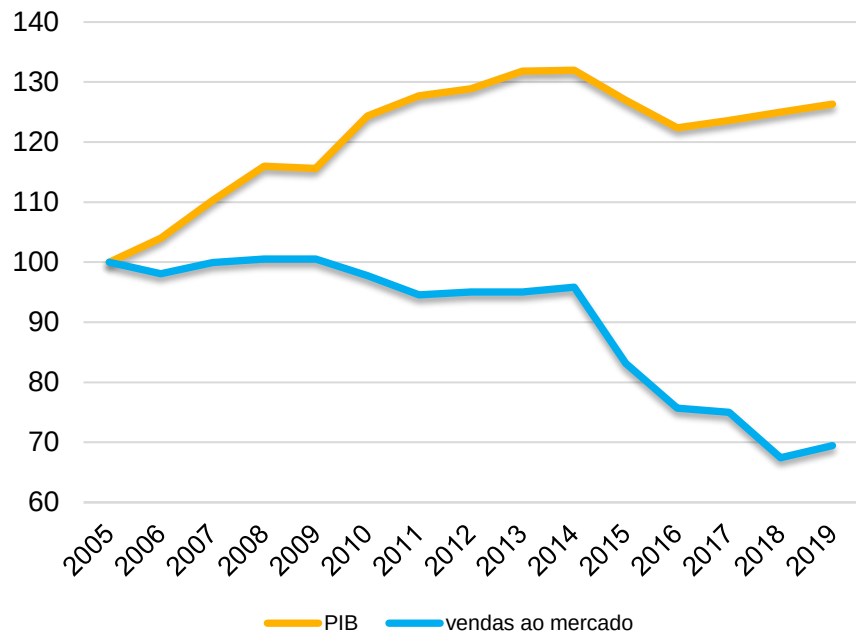


SALES TO THE MARKET



GDP AND SALES TO THE MARKET

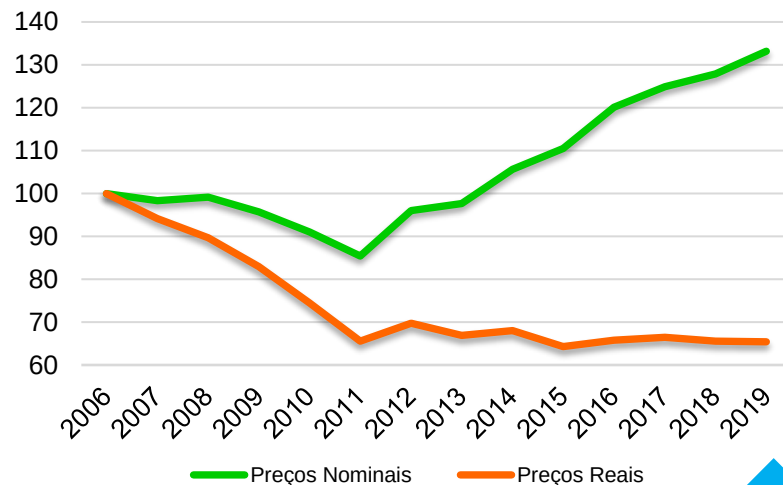
REAL GROWTH
INDEX NUMBER



Production and sales of the Brazilian Publishing Sector
Source: Nielsen | Nielsen Book

AVERAGE PRICEMARKET

AVERAGE CURRENT PRICES AND AVERAGE CONSTANT PRICES
INDEX NUMBER

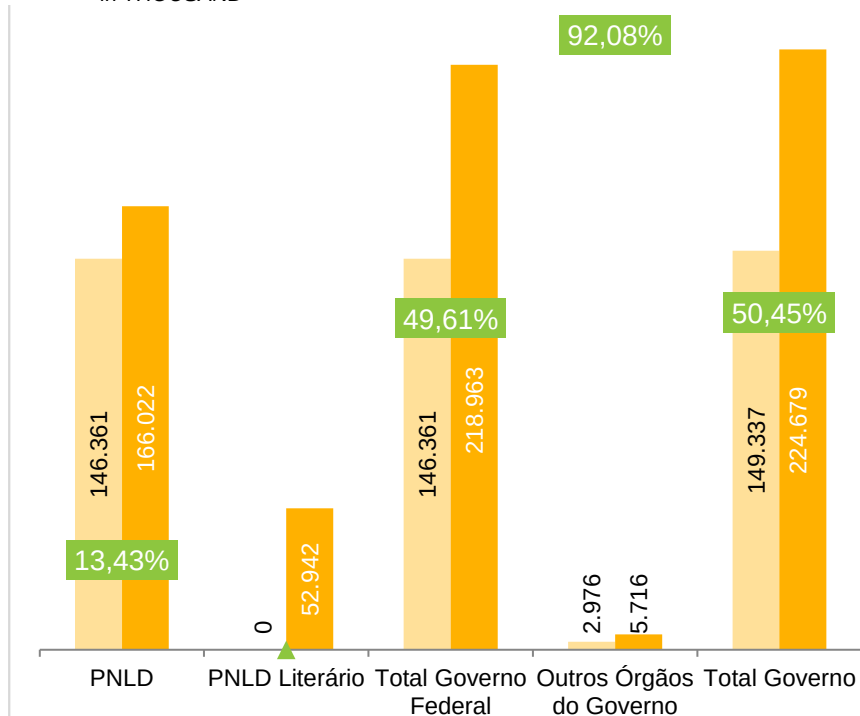


AVERAGE PRICEMARKET

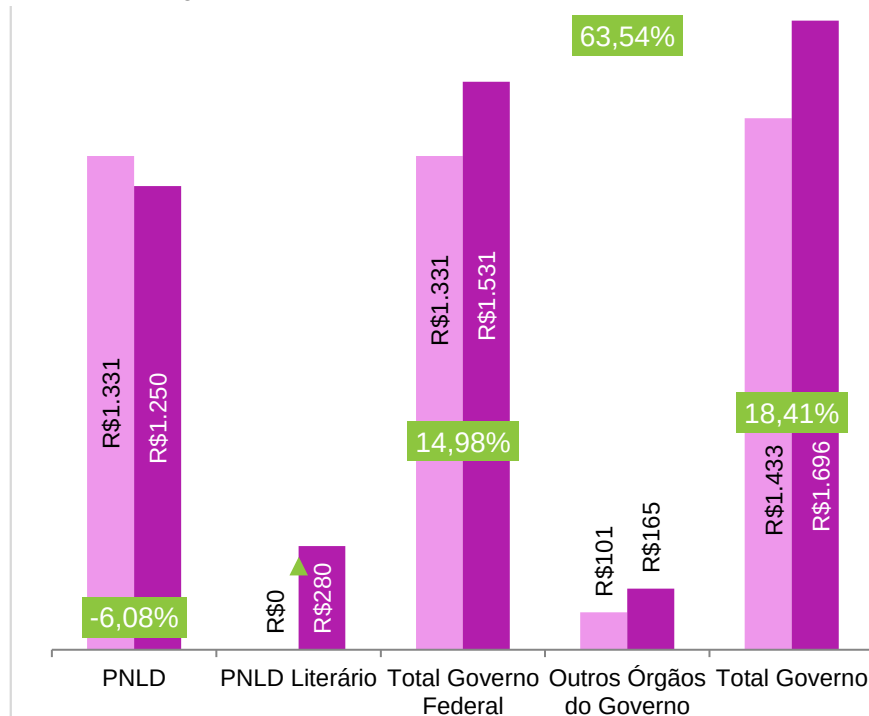
2018	2019	VAR. %
R\$18,19	R\$18,95	4,18

SALES TO GOVERNMENT

COPIES SOLD in THOUSAND



TURNOVER in MILLION



BRAZILIAN PUBLISHING SECTOR SUMMARY

BRAZILIAN PUBLISHING SECTOR SUMMARY



PRODUCTION

	2018	2019	VAR. %
TITLES	46.828	50.331	7,48
COPIES	349 Million	395 Million	12,98



TURNOVER (R\$)

	2018	2019	VAR. %
TOTAL	5,1 Billions	5,7 Billions	10,70
MARKET	3,6 Billions	3,9 Billions	7,70
GOVERNMENT	1,4 Billion	1.6 Billion	18,41



SALES (BY COPIES)

	2018	2019	VAR. %
TOTAL	352 Million	434 Million	23,35
MARKET	202 Million	209 Million	3,38
GOVERNMENT	149 Million	224 Million	50,45

3,3%

It is the **GROWTH** of sales **to** the market in **REAL TERMS**

6,1%

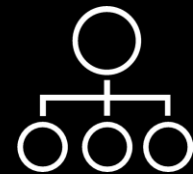
It **is** the **GROWTH** of total sales (MARKET + GOVERNMENT) in **REAL TERMS**



PRODUCTION



SALES



CHANNELS



SUBSECTORS



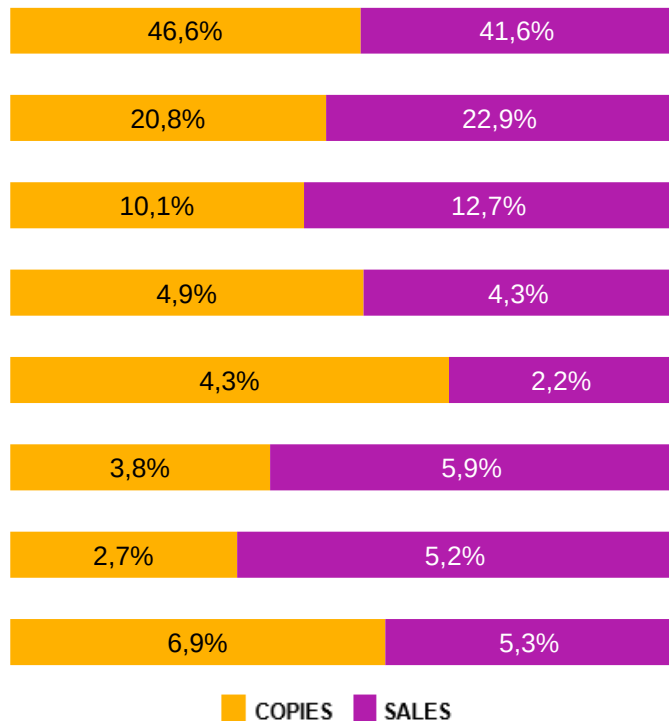
APPENDIX

DISTRIBUTION CHANNEL



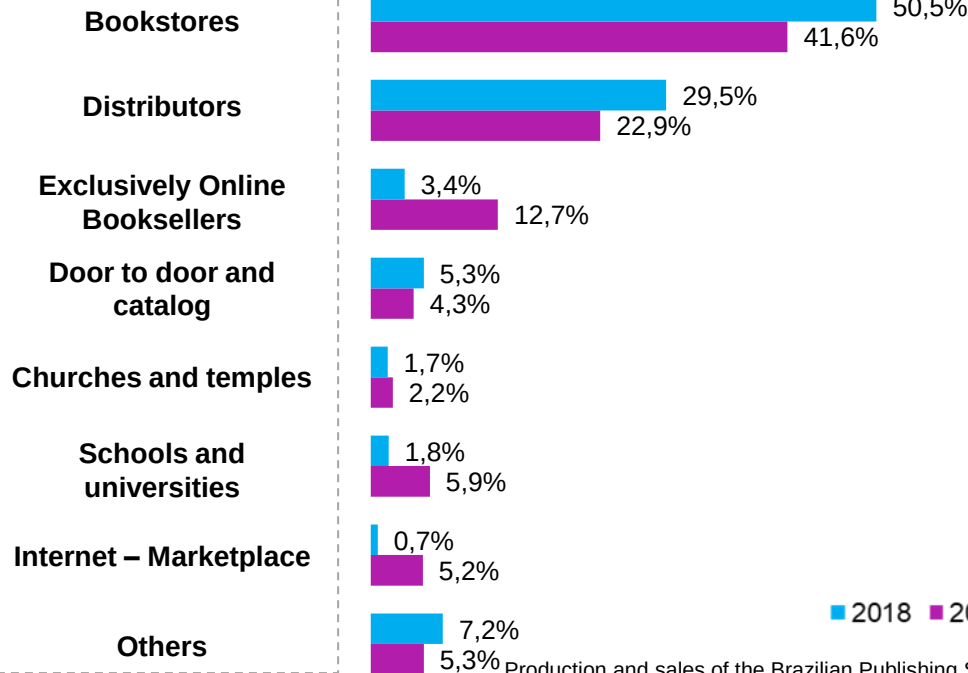
SALES BY CHANEL

Importance



COMPARATIVE PERFORMANCE

Sales



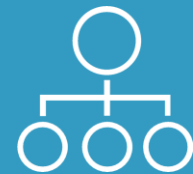
Production and sales of the Brazilian Publishing Sector
Source: Nielsen | Nielsen Book



PRODUCTION



SALES



CHANNELS



SUBSECTORS



APPENDIX

SUBSECTORS – TEXTBOOKS



AVERAGE PRICE MARKET

2018	2019	VAR. %
R\$34,65	R\$33,60	-3,05



VAR. %

PRODUCTION



TITLES

10.726

12.369

15,32

PRODUCED
COPIES

175.205

202.039

15,32

In thousand

SALES

in million



TOTAL

2.737

2.857

4,38

MARKET

1.369

1.422

3,88

GOVERNMENT

1.368

1.435

4,89

SOLD
COPIES

in thousand



TOTAL

185.593

221.882

23,35

MARKET

39.503

42.324

3,38

GOVERNMENT

146.089

179.558

50,45

SEGMENT'S
BEHAVIOR



↓ - 0,4%

**MARKET
SALES**

↑ 0,1%

**TOTAL SALES
(MARKET +
GOVERNMENT)**

Production and sales of the Brazilian Publishing Sector

Source: Nielsen | Nielsen Book

SUBSECTORS – GENERAL TITLES



AVERAGE PRICEMARKET

2018	2019	VAR. %
R\$11,60	R\$13,73	18,33



VAR. %

PRODUCTION



TITLES

17.218

21.300

23,71

PRODUCED
COPIES

77.948

110.228

41,41

In thousand

TURNOVER



In million

TOTAL

1.084

1.443

33,05

MARKET

1.021

1.222

19,76

GOVERNMENT

64

220

246,06

SOLD
COPIES

In thousand



TOTAL

91.198

126.863

39,11

MARKET

87.983

89.045

1,21

GOVERNMENT

3.216

37.818

-

Production and sales of the Brazilian publishing sector

Source: Nielsen | Nielsen Book

SEGMENT'S BEHAVIOR



↑ 14,8%

SALES TO
THE
MARKET

↑ 27,5%

TOTAL SOLD COPIES
(MARKET + GOVERNMENT)

SUBSECTORS – RELIGIOUS



AVERAGE PRICEMARKET

2018	2019	VAR. %
R\$9,49	R\$9,84	3,76



VAR. %

PRODUCTION



TITLES

6.451

12.369

91,73

PRODUCED
COPIES

68.955

62.282

-9,68

In Thousand

TURNOVER



In million

TOTAL

564

632

12,03

MARKET

564

624

10,72

GOVERNMENT

0,4

8

-

SOLD
COPIES

In thousand



TOTAL

59.438

64.901

9,19

MARKET

59.424

63.410

6,71

GOVERNMENT

14

1.491

-

SEGMENT'S BEHAVIOR



6,1%

SALES TO
THE
MARKET



7,4%

TOTAL SOLD COPIES
(MARKET + GOVERNMENT)

Production and sales of the Brazilian publishing sector
Source: Nielsen | Nielsen Book

SUBSECTOR – CTP



AVERAGE PRICEMARKET

2018	2019	VAR. %
R\$46,53	R\$47,62	2,32



VAR. %

PRODUCTION



TÍTULOS
PRODUCED
COPIES

In Thousand

12.434

10.353

-16,73

27.807

20.783

-25,26

TURNOVER



In million

TOTAL
MARKET
GOVERNMENT

734

735

0,21

734

702

-4,25

0,3

33

-

SOLD
COPIES

In Thousand



TOTAL
MARKET
GOVERNMENT

15.783

20.564

30,29

15.765

14.752

-6,43

18

5.812

SEGMENT'S BEHAVIOR



-8,2%

SALES TO
THE
MARKET

-3,9%

TOTAL SOLD COPIES
(MARKET + GOVERNMENT)

Production and sales of the Brazilian publishing sector
Source: Nielsen | Nielsen Book

CHANNELS BY SUBSECTOR / PARTICIPATION (%)

TEXTBOOKS



RELIGIOUS



GENERAL TITLES



CTP

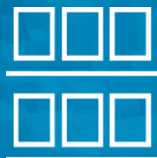


Production and sales of the Brazilian Publishing Sector

Source: Nielsen | Nielsen Book



PRODUCTION



SALES



CHANNELS



SUBSECTORS



APPENDIX

PRODUCTION

EDITED TITLES AND PRODUCED COPIES

	TITLES			COPIES		
	2018	2019	VAR. %	2018	2019	VAR. %
NEW ISBN NUMBERS	14.639	13.671	-6,61	70.544.691	77.916.547	10,45
REPRINT	32.189	36.659	13,89	279.369.952	317.415.435	13,62
TOTAL	46.828	50.331	7,48	349.914.643	395.331.981	12,98

EDITED TITLES AND PRODUCED COPIES BY SUBSECTOR

(NEW ISBNs + REPRINTS)

	TITLES			COPIES		
	2018	2019	VAR. %	2018	2019	VAR. %
TEXTBOOKS	10.726	12.369	15,32	175.204.544	202.038.735	15,32
GENERAL TITLES	17.218	21.300	23,71	77.948.217	110.228.141	41,41
RELIGIOUS	6.451	6.309	-2,20	68.954.643	62.282.344	-9,68
CTP	12.434	10.353	-16,73	27.807.239	20.782.761	-25,26
TOTAL	46.828	50.331	7,48	349.914.643	395.331.981	12,98

PRODUCTION

EDITED TITLES AND PRODUCED COPIES BY SUBSECTOR

(NEW ISBNs)

	TITLES			COPIES		
	2018	2019	VAR. %	2018	2019	VAR. %
TEXTBOOKS	646	734	13,70	5.642.274	5.847.456	3,64
GENERAL TITLES	6.602	6.692	1,36	44.645.175	53.640.882	20,15
RELIGIOUS BOOKS		1.783	-6,70	13.324.464	14.197.111	6,55
CTP	5.480	4.462	-18,57	6.932.778	4.231.097	-38,97
TOTAL	14.639	13.671	-6,61	70.544.691	77.916.547	10,45

THEMES

2018

2019

	TOTAL COPIES	SHARE %	TOTAL COPIES	SHARE %
Textbooks	162.858.488	46,54	187.929.771	47,54
Religious	87.061.285	24,88	74.109.905	18,75
Children's Literature	13.538.265	3,87	36.383.887	9,20
Adult Literature	26.403.505	7,55	22.491.447	5,69
Youth Literature	6.579.692	1,88	12.717.715	3,22
Self-help	17.253.098	4,93	12.285.719	3,11
Economics, adm. and Business and Public adm.	3.185.442	0,91	7.018.257	1,78
Humanities and Social Sciences	4.910.163	1,40	6.189.362	1,57
Law	4.887.361	1,40	5.101.570	1,29
Psychology and Philosophy	1.639.609	0,47	4.028.141	1,02
Young Adult	2.267.296	0,65	3.791.904	0,96
Biographies	5.026.484	1,44	2.970.727	0,75
Medicine, Pharmacy, Public Health e Hygiene	2.328.760	0,67	2.302.334	0,58
Languages and Linguistics	4.257.128	1,22	2.145.480	0,54
Education and Pedagogy	838.608	0,24	1.909.711	0,48
HQs	-	-	1.864.636	0,47
Arts	597,6	0,17	1.447.601	0,37
Mathematics, Statistics, Logic and Natural Sciences	429.763	0,12	1.293.068	0,33
Engineering and Technology	374.072	0,11	1.050.063	0,27
Dictionaries and School Atlas	714.348	0,20	984.634	0,25
Gastronomy	1.116.236	0,32	919.525	0,23
Information Technology, Computation and Programming	243.784	0,07	711.078	0,18
Agriculture Veterinary and Pets	438.398	0,13	575.978	0,15
Architecture and Urbanism	44.557	0,01	556.546	0,14
Tourism and Leisure	249.636	0,07	524.516	0,13
Physical Education and Sports	802.984	0,23	447.192	0,11
Others	1.868.082	0,53	3.581.215	0,91
TOTAL	349.914.644	100	395.331.981	100

SALES

INCOME AND SOLD COPIES

(MARKET + GOVERNMENT)

	SOLD COPIES		
	2018	2019	VAR. %
TOTAL	352.012.073	434.210.276	23,35

	INCOME R\$		
	2018	2019	VAR. %
	5.119.449.812	5.667.135.287	10,70

INCOME AND SOLD COPIES - TOTAL BY SUBSECTOR

(MARKET + GOVERNMENT)

	SOLD COPIES		
	2018	2019	VAR. %
TEXTBOOKS	185.592.860	221.881.978	19,55
GENERAL TITLES	91.198.457	126.863.081	39,11
RELIGIOUS	59.437.647	64.901.291	9,19
CTP	15.783.109	20.563.926	30,29
TOTAL	352.012.073	434.210.276	23,35

	INCOME R\$		
	2018	2019	VAR. %
	2.737.034.241	2.856.993.030	4,38
	1.084.349.919	1.442.677.221	33,05
	564.106.165	631.977.938	12,03
	733.959.485	735.487.098	0,21
	5.119.449.812	5.667.135.287	10,70

SALES

INCOME AND COPIES SOLD TO THE MARKET

	SOLD COPIES		
	2018	2019	VAR. %
TEXTBOOKS	39.503.370	42.324.416	7,14
GENERAL TITLES	87.982.753	89.044.974	1,21
RELIGIOUS	59.423.797	63.409.904	6,71
CTP	15.765.390	14.751.817	-6,43
TOTAL	202.675.310	209.531.110	3,38

	TURNOVER R\$		
	2018	2019	VAR. %
TEXTBOOKS	1.368.884.698	1.421.969.832	3,88
GENERAL TITLES	1.020.694.427	1.222.391.591	19,76
RELIGIOUS	563.709.648	624.146.970	10,72
CTP	733.642.035	702.435.564	-4,25
TOTAL	3.686.930.808	3.970.943.957	7,70

PREÇO MÉDIO MARKET (R\$)

	2018	2019	VAR. %
TEXTBOOKS	34,65	33,60	-3,05
GENERAL TITLES	11,60	13,73	18,33
RELIGIOUS	9,49	9,84	3,76
CTP	46,53	47,62	2,32
TOTAL	18,19	18,95	4,18

CHANNELS

SALE CHANNELS 2019

	Sold copies	Share %	Turnover	Share %
Bookstores	97.621.927	46,59	1.652.071.027	41,60
Distributors	43.503.030	20,76	908.996.097	22,89
Bookstores exclusively virtual	21.070.532	10,06	502.555.010	12,66
Schools and universities	8.054.548	3,84	233.938.193	5,89
Internet – Market Place	5.603.249	2,67	206.680.436	5,20
Door to door and catalogues	10.291.750	4,91	169.269.277	4,26
Churches and Temples	9.029.172	4,31	88.635.204	2,23
Companies	2.250.259	1,07	39.125.896	0,99
Book fairs/Bienal	1.905.823	0,91	28.550.869	0,72
Direct Marketing (direct mail, mail)	889.338	0,42	26.728.363	0,67
Supermarket	3.316.531	1,58	26.628.691	0,67
Private libraries	308.929	0,15	23.726.430	0,60
Book club	1.520.145	0,73	13.174.209	0,33
Exportation	669.314	0,32	10.448.080	0,26
Newspapers stands	604.724	0,29	4.176.588	0,11
Joint sale with newspapers - promotional sales	-	-	-	-
Others	2.891.840	1,38	36.239.585	0,91
TOTAL	209.531.110	100	3.970.943.957	100

CHANNELS

SALES CHANNELS TURNOVER

	<u>2018</u>	Share %	<u>2019</u>	Share %
Bookstores	1.860.065.547	50,45	1.652.071.027	41,60
Distributors	1.086.406.365	29,47	908.996.097	22,89
Bookstores exclusively virtual	125.637.590	3,41	502.555.010	12,66
Schools and universities	65.877.127	1,79	233.938.193	5,89
Internet – Market Place	27.143.046	0,74	206.680.436	5,20
Door to door and catalogues	195.739.888	5,31	169.269.277	4,26
Churches and Temples	61.017.592	1,65	88.635.204	2,23
Companies	20.697.853	0,56	39.125.896	0,99
Book fairs/Bienal	-	-	28.550.869	0,72
Direct Marketing (direct mail, mail)	26.563.583	0,72	26.728.363	0,67
Supermarket	74.421.060	2,02	26.628.691	0,67
Private libraries	24.649.280	0,67	23.726.430	0,60
Book club	20.142.684	0,55	13.174.209	0,33
Exportation	38.572.268	1,05	10.448.080	0,26
Newspapers stands	14.384.495	0,39	4.176.588	0,11
Joint sale with newspapers - promotional sales	5.906.079	0,16	-	0,00
Others	39.706.345	1,08	36.239.585	0,91
TOTAL	3.686.930.809	100	3.970.943.957	100

CHANNELS BY SUBSECTOR

▶ SHARE (%)

TEXTBOOKS

	COPIES	TURNOVER
Bookstores	36,26	38,09
Distributors	30,22	30,50
Bookstores exclusively virtual	10,66	12,34
Schools and universities	16,41	11,97
Internet – Market Place	3,80	6,57
Others	2,64	0,53

RELIGIOUS

	COPIES	TURNOVER
Bookstores	38,62	32,54
Door to door and catalogue	13,13	24,97
Distributors	25,00	14,12
Churches and temples	15,57	14,04
Internet – Market Place	0,97	4,60
outros	6,72	9,73

GENERAL TITLES

	COPIES	TURNOVER
Bookstores	57,67	57,93
Distributors	13,15	15,52
Bookstores exclusively virtual	12,90	13,68
Internet – Market Place	2,94	2,89
Supermarket	3,45	2,47
outros	9,89	7,51

CTP

	COPIES	TURNOVER
Bookstores	31,09	28,73
Bookstores exclusively virtual	25,52	26,11
Distributors	25,79	20,30
Private libraries	3,37	6,04
Internet – Market Place	5,27	5,87
Others	8,96	12,95

THANK YOU!

