

Nielsen  
BookData

**PRODUCTION AND  
SALES BRAZILIAN  
PUBLISHING SECTOR**  
*Printed Book*      Base Year 2023

May 2024

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## Production And Sales - Brazilian Publishing Sector Printed Book

Industry Analysis

Longest-lasting research in the country and in Latin America

By conducting this analysis on an annual basis, we can effectively evaluate the Brazilian market throughout the years.

This study covers every possible Sales channel in the publishing industry

Developed by:

# HIGHLIGHTS

Year Base 2023

Nielsen BookData



## Sector

There was a **nominal decline** of **0.8%** in **market sales**, which equates to a **decrease** of **5.1%** when accounting for the **4.62% inflation rate** (IPCA).



## Price

There was an **8% drop** in the number of **copies sold** to the **market**, and the revenue decline would have been more significant if not for a **nominal 7.9% increase** in the **average book price**. In real terms, this **increase** is **3.2%**.



## Category

**Educational publishers** had a **positive nominal performance** in sales to the market of **1.2%**, and **Religious publishers** experienced **nominal growth** of **4.5%**. **Trade publishers** recorded a **nominal decline** of **2.5%**. The **nominal decline** in **academic & professional publishers** was even more significant, with a **negative variation** of **5.9%**.



## Channels

The **Exclusively Virtual Bookstores** continue to **lead the ranking** of channels with the **highest share** in **publishers' revenue**. For the first time, **publishers' websites and marketplaces** are among the **top 5 channels** with the highest contribution to **publishers' revenue**. This **channel** is more **relevant** for **educational and academic & professional publishers**.

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# PRODUCTION

Printed Book



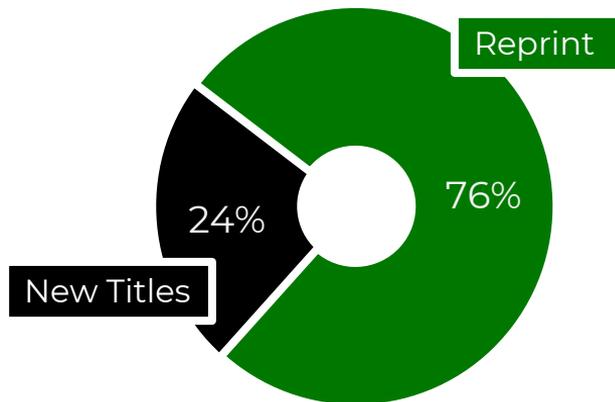
May, 2024

Nielsen BookData | Production and sales -Brazilian Publishing Sector – Base Year 2023

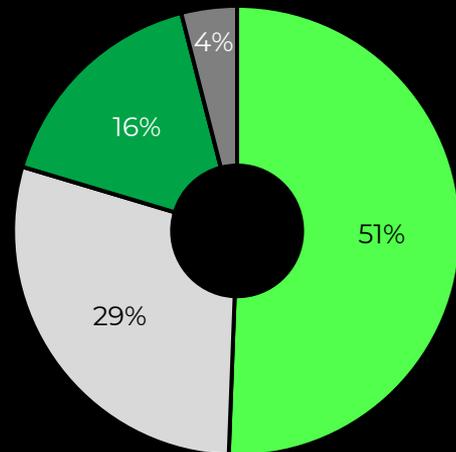
# Publishers Production

In 2023 the publishers produced:

 **45** Thousand  
Titles Published

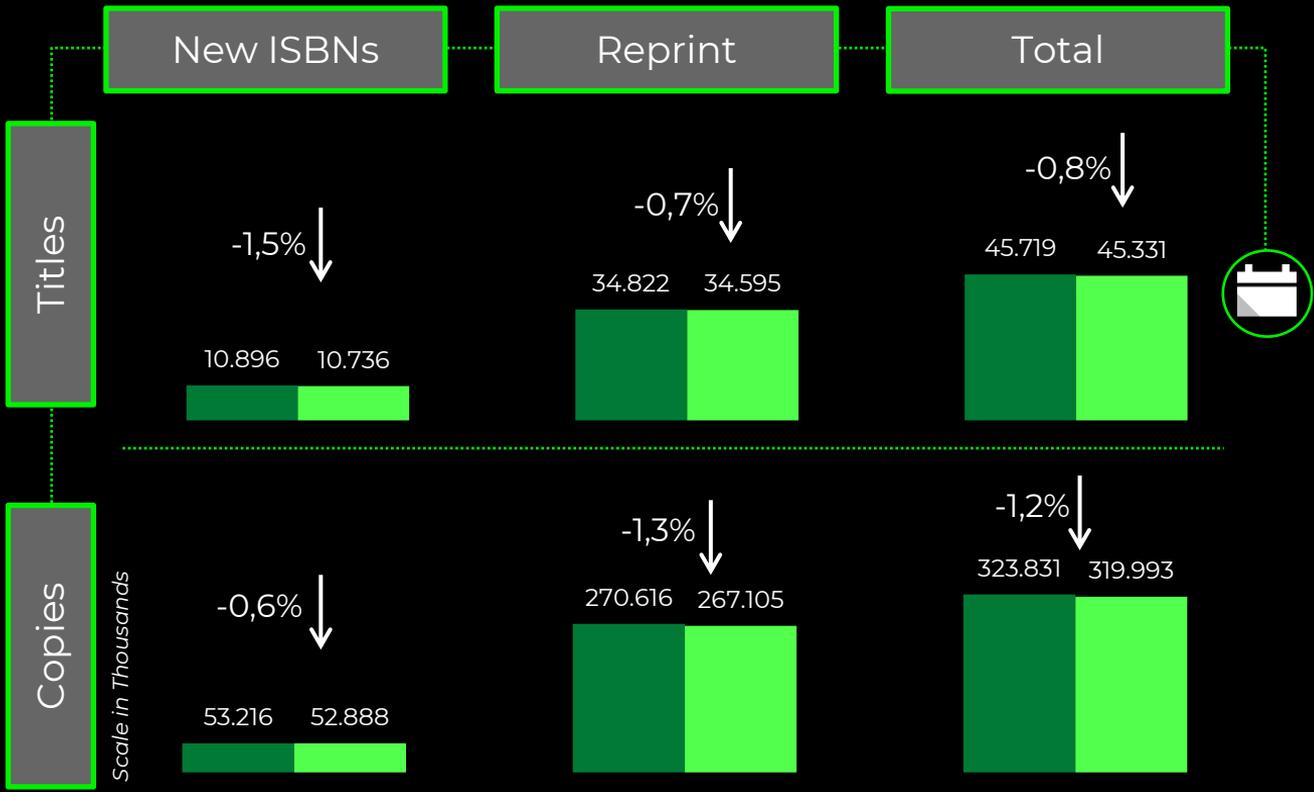


 **320** Millions  
of Copies



 Educational  Trade  
 Religious  Academic & Professional

# Publishers Production



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# Sales

Printed Book

May, 2024

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# Publishers Sales



Sold Copies



328 Millions

172 Millions

155 Millions



Revenue

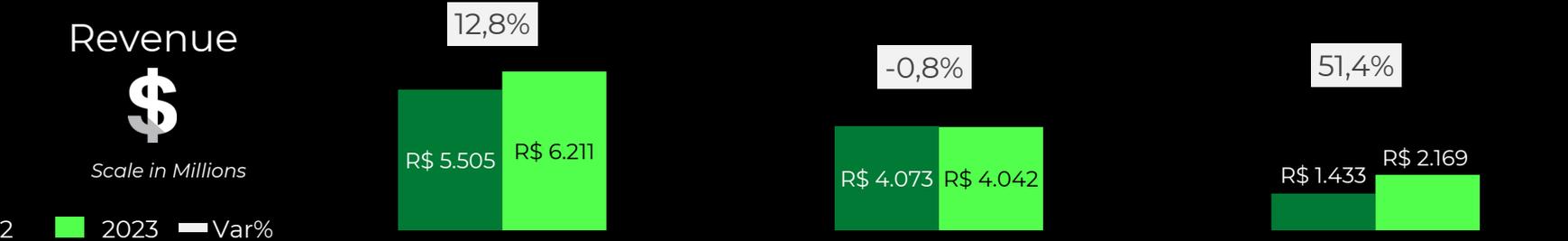
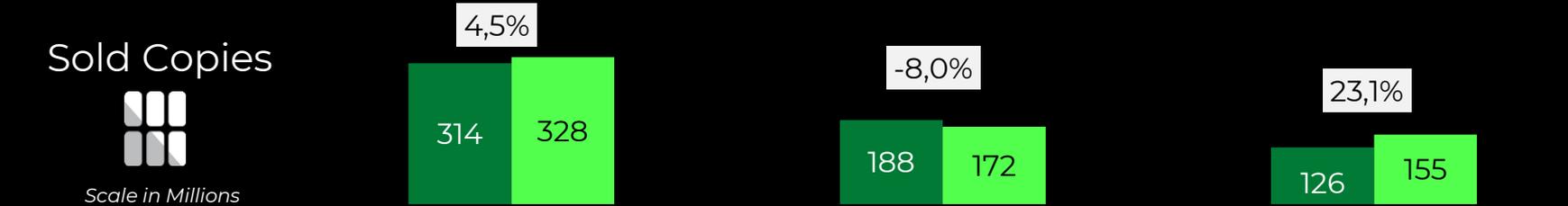


R\$6.2 Billions

R\$4 Billions

R\$2.2 Billions

# Publishers Sales

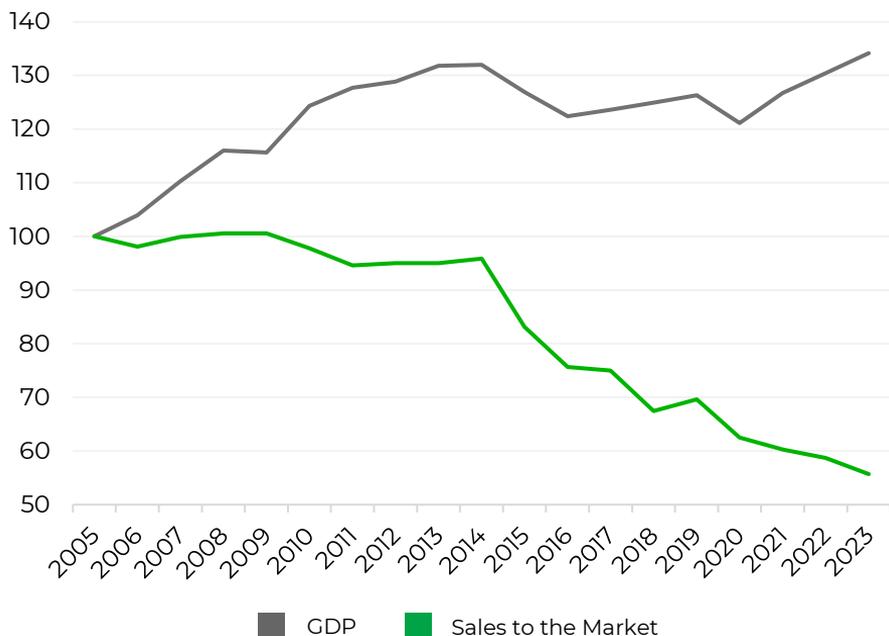


■ 2022 ■ 2023 ▬ Var%

# Sales to the Market

## GDP and Sales to the Market

REAL GROWTH - INDEX NUMBER



## Average Market Prices

CURRENT VALUES AND CONSTANT VALUES INDEX NUMBER



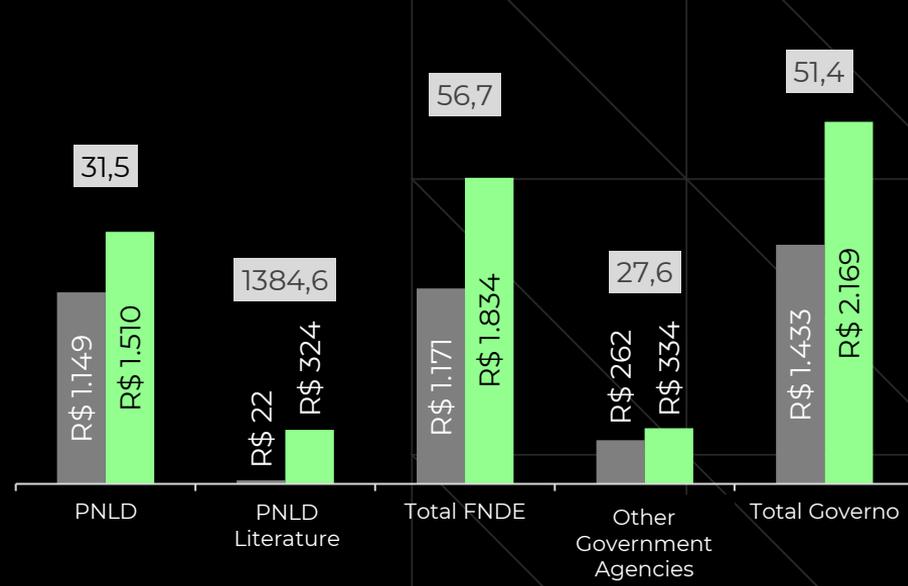
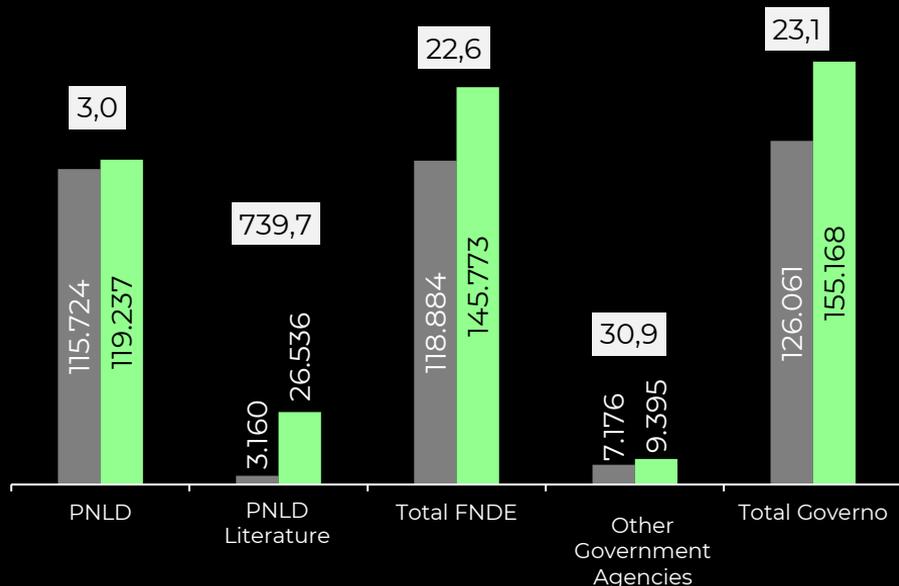
Average Price				
\$	Nominal	2022	2023	VAR. %
		R\$21,71	R\$23,43	7,9

# Sales to the Government



Scale in Thousands

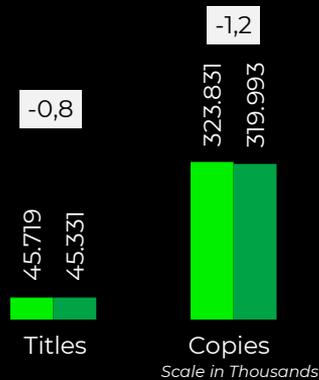
Scale in Millions



■ 2022 ■ 2023 ▬ VAR.%

# Industry Summary

## Production



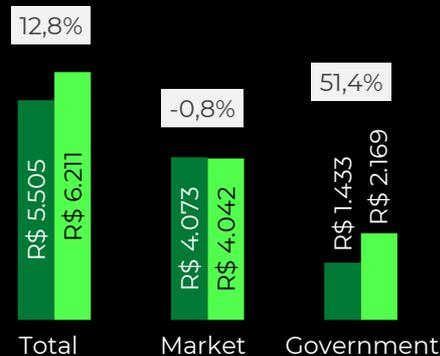
## Sold Copies

Scale in Thousands



## Revenue

Scale in Millions



## Average Price - Market

2022	2023	VAR. %
R\$21,71	R\$23,43	7,9

## Revenue In Real Terms



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# CHANNELS

Printed Book



May 2024

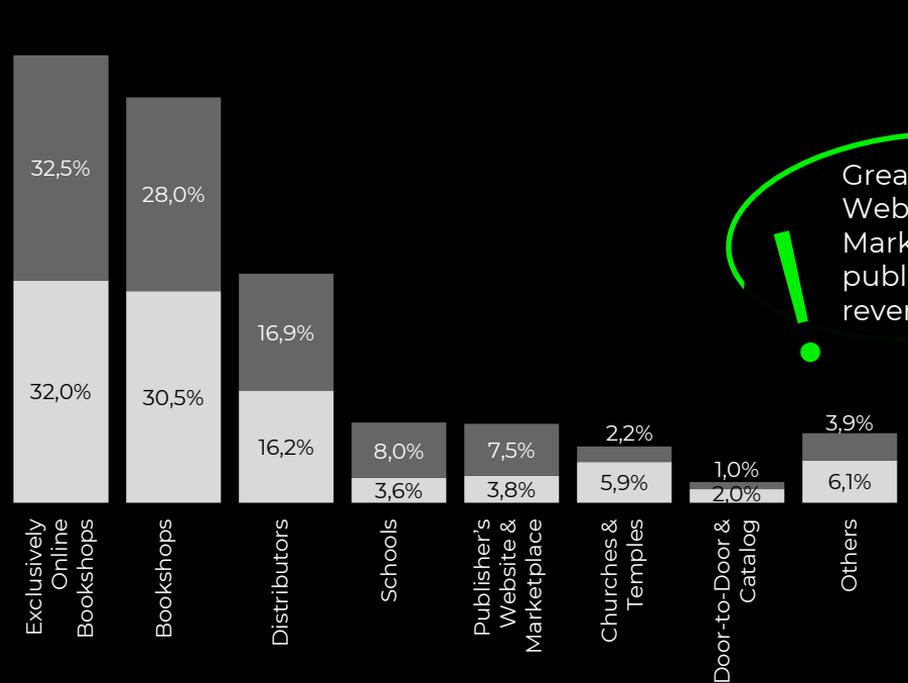
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# Channels

## Sales by Channel

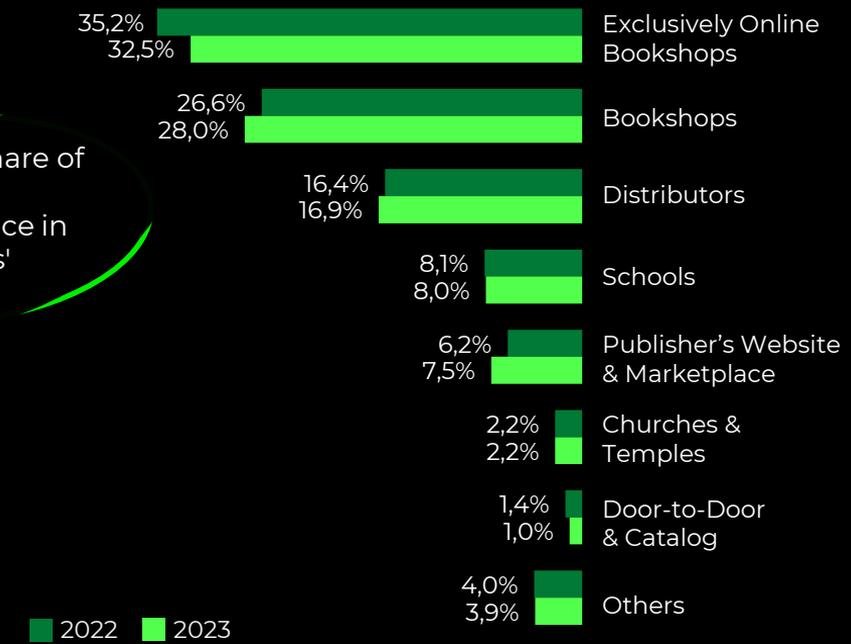
Share % - Sold Copies & Revenue - 2023



Greater share of Website & Marketplace in publishers' revenue.

## Comparative Performance

Share % - Revenue 2022 vs 2023



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# PERFORMANCE BY PUBLISHER CATEGORY

Printed Book

May 2024

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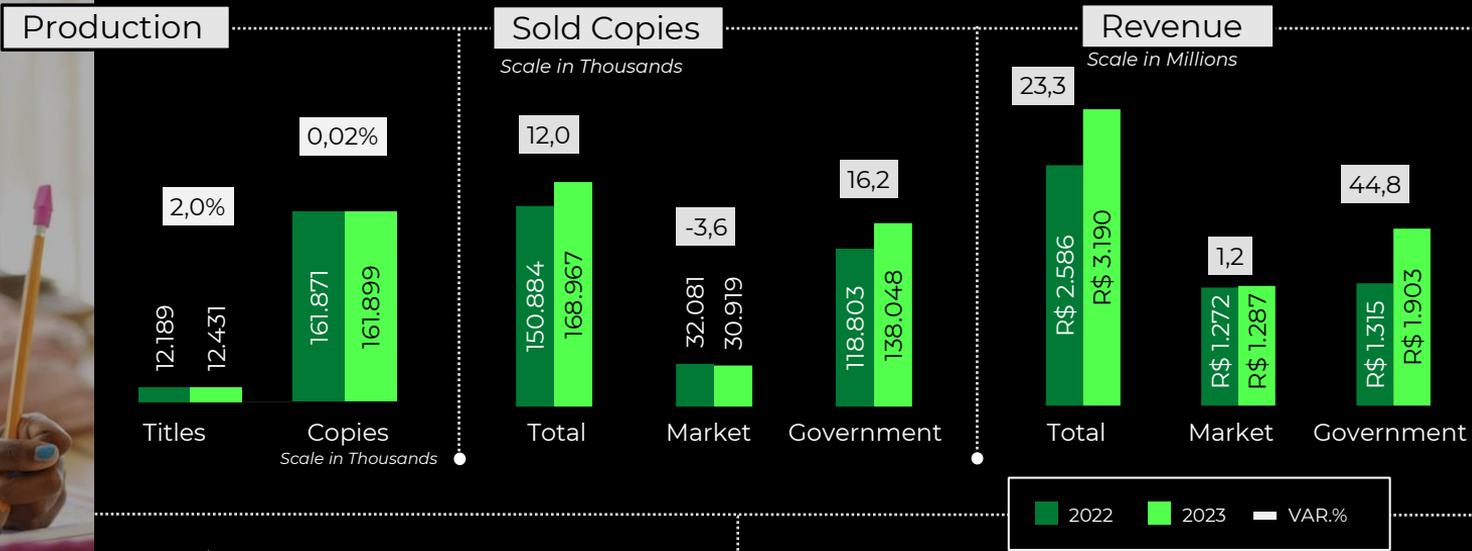
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**CBL**  
Câmara  
Brasileira  
do Livro



# Educational Publishers

Nielsen BookData



**Average Price - Market**

	2022	2023	VAR. %
	R\$39,64	R\$41,61	5,0





# Channels

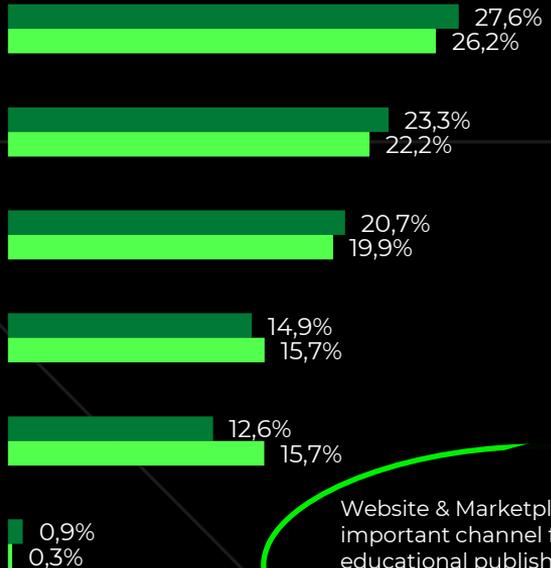
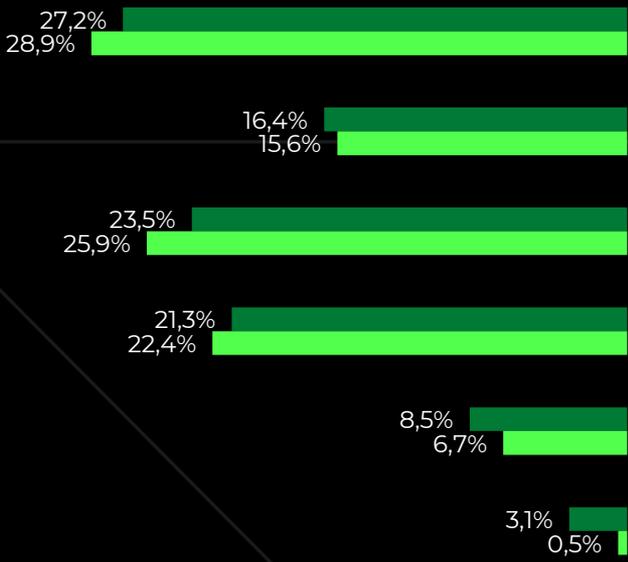
## Educational Publishers

Sold Copies

Share

Revenue \$

Share

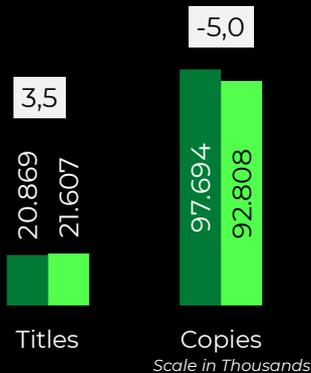


■ 2022 ■ 2023

**!** Website & Marketplace is an important channel for educational publishers, as it holds the largest share in this category, with a growth of 3.1 p.p in 2023

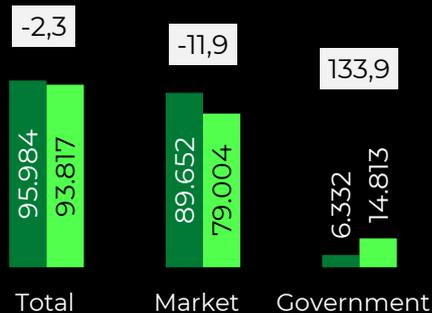
# Trade Publishers

## Production



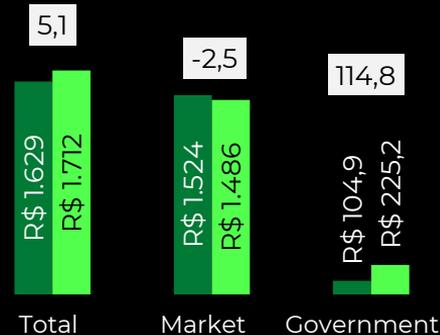
## Sold Copies

Scale in Thousands



## Revenue

Scale in Millions



■ 2022 ■ 2033 ▬ VAR. %



## Average Price - Market

Year	2022	2023	VAR. %
Price	R\$17,00	R\$18,82	10,7

## Revenue In Real Terms

Sales to the Market

↓ -6,8%

Total Sales

Market + Government

↑ 0,4%

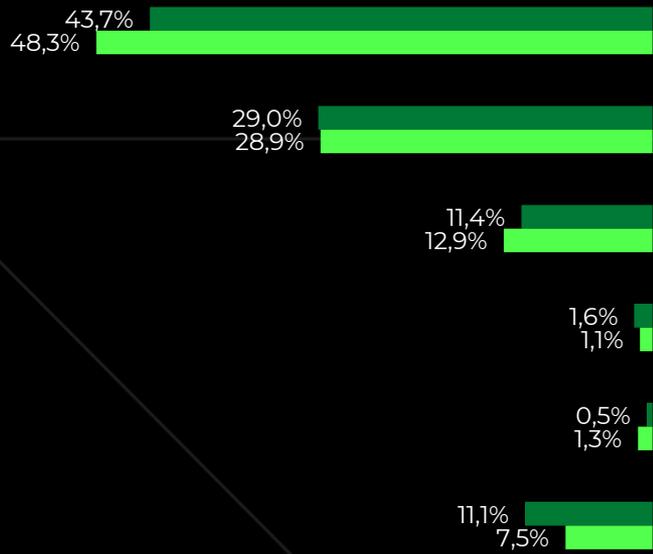


# Channels

## Trade Publishers

Sold Copies  
Share

Revenue \$  
Share



Exclusively Online Bookshops

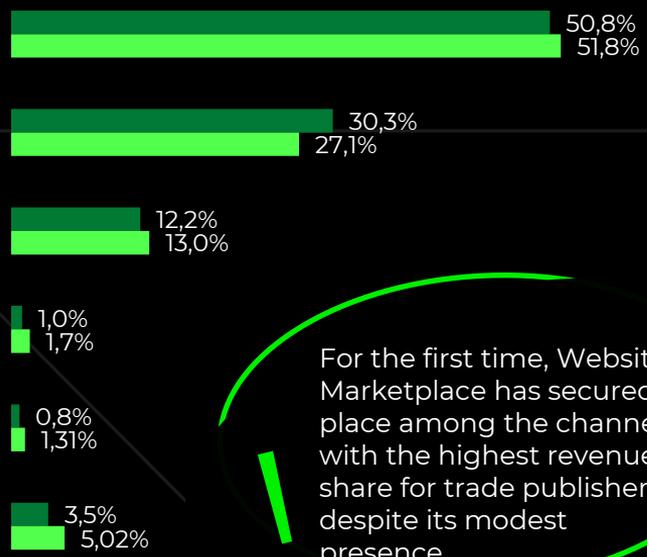
Bookshops

Distributors

Book Fair/RJ Bial

Publisher's Website & Marketplace

Others



For the first time, Website & Marketplace has secured a place among the channels with the highest revenue share for trade publishers, despite its modest presence.

■ 2022 ■ 2023

■ 2022 ■ 2023

# Religious Publishers



**Average Price - Market**

	2022	2023	VAR. %
	R\$12,06	R\$13,11	8,7





# Channels

## Religious Publishers

Sold Copies

Share

Revenue \$

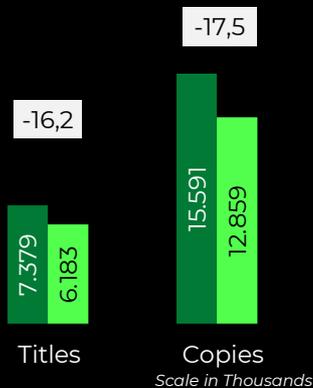
Share



Website & Marketplace overtakes the door-to-door catalogue and joins the ranking of the top 5 channels in terms of contribution to revenue for religious publishers.

# CTP

## Production



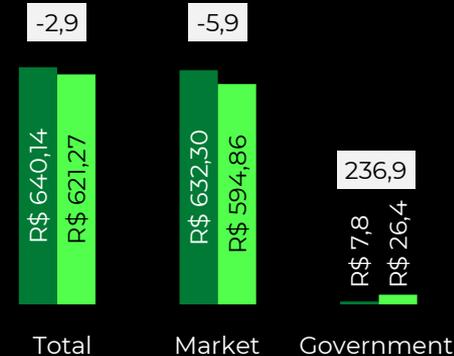
## Sold Copies

Scale in Thousands



## Revenue

Scale in Millions



## Average Price - Market

2022	2023	VAR. %
R\$51,04	R\$53,39	4,6

## Revenue In Real Terms

Sales to the Market



Total Sales

Market + Government





# Canais de Distribuição

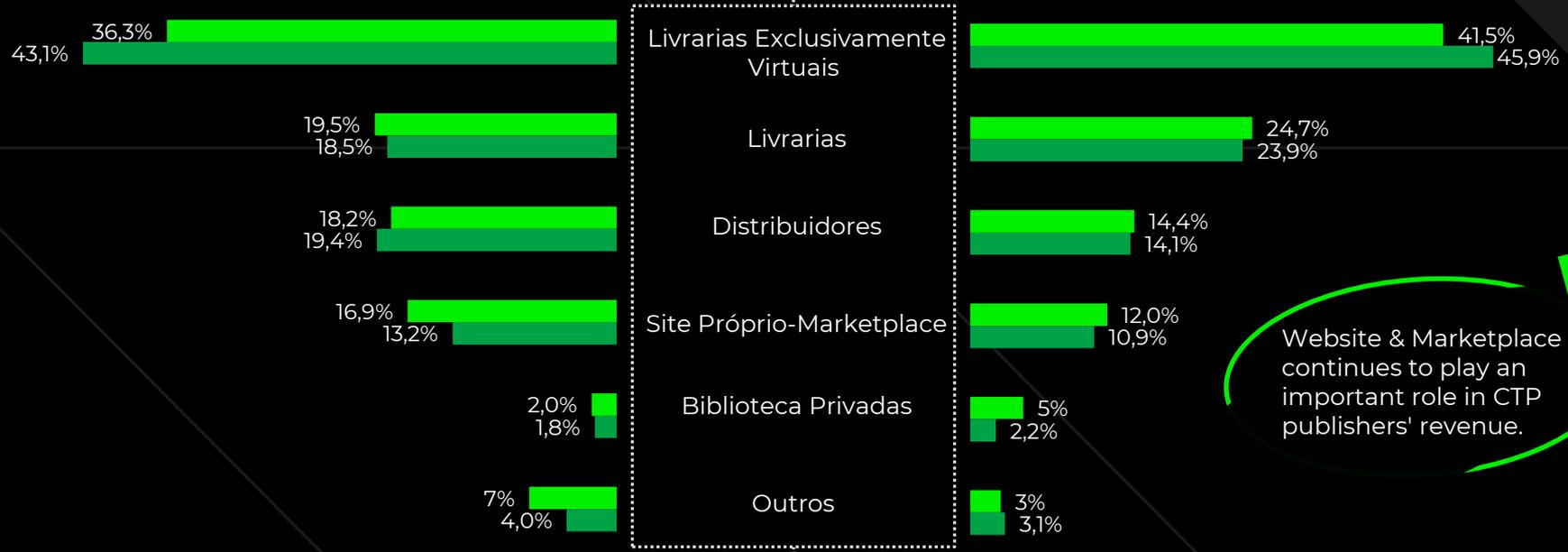
CTP

Sold Copies

Share

Revenue \$

Share



Website & Marketplace continues to play an important role in CTP publishers' revenue.

# PRINT VS DIGITAL



# Publishers Sales

## Print vs Digital

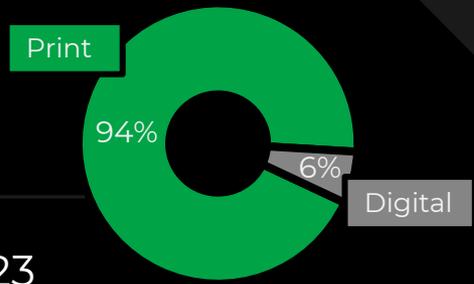
In Thousands

	2022	2023	VAR%
PRINT*	R\$4.072.702	R\$4.041.758	-0,8%
DIGITAL	R\$244.376	R\$339.275	38,8%
TOTAL	R\$4.317.079	R\$4.381.033	1,5%

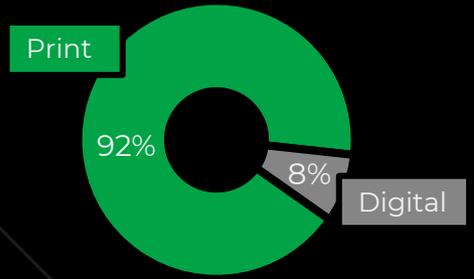
In Real Terms  
↓ -3%

## Print vs Digital % 2022 x 2023

2022



2023



\* For book prints, only market sales were considered.

# APPENDIX & METHODOLOGY

## Study

The Study is sponsored by the Brazilian Association of Book Publishers (SNEL) and the Brazilian Book Chamber (CBL) and developed by Nielsen BookData.

## Data Collection Process

The data collection is executed through an online form, provided by Nielsen BookData Systems to Brazilian publishers.

## Survey

The survey questions are about Publishers' production and Publishers' sales to the market and to the government, considering published titles, produced copies, sold copies, Revenue, channels, etc. the publisher's category is defined by the largest share of its revenue (e.g. a publisher that earns most of its revenue from selling educational books, declares itself an educational publisher.)

The publishing industry is divided in four categories:

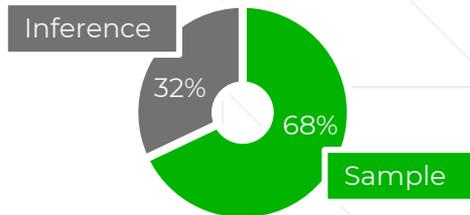
- Educational
- Trade
- Religious
- Academic and Professional.

## Government Data

The publishers' sales to the government data is gathered from survey provided to the publishers and sent by FNDE (National Fund for Educational Development, in portuguese) directly to Nielsen BookData

## Sample

Sample: publishers who aswered the survey two years in a row. The sample coverage is 68% of the revenue for the survey base year 2023.



## Inference

Based on the variations measured in relation to the previous year, the statistical inference process is applied to reach the total market values.

## Data in Real Terms

Data in real terms are calculated according to the IPCA (Consumer Prices Index Broad, in Portuguese) by IBGE (Brazilian Institute of Geography and Statistics, in Portuguese). In 2023 the IPCA registered a variation of 4.62%.

# Publishers Production

## ▶ Titles and Published Copies

### ▶ Titles

### ▶ Copies

	2022	2023	VAR.%%	2022	2023	VAR.%%
New ISBNs	10.896	10.736	-1,47	53.215.860	52.887.898	-0,62
Reprint	34.822	34.595	-0,65	270.615.502	267.104.830	-1,30
<b>Total</b>	<b>45.719</b>	<b>45.331</b>	<b>-0,85</b>	<b>323.831.361</b>	<b>319.992.728</b>	<b>-1,19</b>

## ▶ Titles and Published Copies by Publisher Category

### ▶ Titles

### ▶ Copies

	2022	2023	VAR.%%	2022	2023	VAR.%%
Educational	12.189	12.431	1,99	161.870.944	161.899.314	0,02
Trade	20.869	21.607	3,54	97.693.623	92.808.484	-5,00
Religious	5.282	5.109	-3,27	48.675.460	52.425.780	7,70
Academic & Professional	7.379	6.183	-16,20	15.591.334	12.859.150	-17,52
<b>Total</b>	<b>45.719</b>	<b>45.331</b>	<b>-0,85</b>	<b>323.831.361</b>	<b>319.992.728</b>	<b>-1,19</b>

# Publishers Production

## ▶ Titles and Published Copies by Publisher Category – New ISBNs

### ▶ Titles

### ▶ Copies

	2022	2023	VAR.%%	2022	2023	VAR.%%
Educational	530	556	4,90	3.748.023	3.806.066	1,55
Trade	6.680	6.842	2,43	36.303.152	36.793.004	1,35
Religious	1.115	1.076	-3,47	10.098.530	9.270.435	-8,20
Academic & Professional	2.572	2.261	-12,07	3.066.154	3.018.393	-1,56
<b>Total</b>	<b>10.896</b>	<b>10.736</b>	<b>-1,47</b>	<b>53.215.860</b>	<b>52.887.898</b>	<b>-0,62</b>

# Publishers Production

	2022		2023		
Books	Copies	Share %	Copies	Share %	2022 vs 2023
Educational	184.010.675	56,82	181.937.019	56,86	-1%
Religious	53.025.483	16,37	54.981.922	17,18	4%
Adult Literature	20.004.113	4,34	18.558.800	5,80	-7%
Children's	15.699.225	6,18	16.569.412	5,18	6%
Youth Literature	14.055.538	4,85	14.934.659	4,67	6%
Self Help	8.469.198	2,62	7.590.171	2,37	-10%
Economy & Business	4.196.037	1,30	3.485.877	1,09	-17%
Y&A	3.470.495	0,96	3.475.709	1,09	0%
Psychology and Philosophy	3.260.964	1,03	2.724.504	0,85	-16%
Social Sciences and Humanities	3.341.809	1,07	2.669.969	0,83	-20%
Law	3.123.978	1,01	2.612.653	0,82	-16%
Biographies	1.787.178	0,55	1.708.111	0,53	-4%
Comics & Graphic Novels	911.885	0,35	1.314.937	0,41	44%
Medicine & Health	1.431.083	0,44	1.178.571	0,37	-18%
Education and Pedagogy	1.128.155	0,28	882.002	0,28	-22%
Arts	890.495	0,29	850.996	0,27	-4%
Languages and Linguistics	930.799	0,27	830.293	0,26	-11%
Mathematics, Statistics, Logic and Natural Sciences	373.434	0,12	451.084	0,14	21%
Dictionaries and School Atlas	303.245	0,12	281.130	0,09	-7%
Engineering and Technology	392.334	0,09	269.340	0,08	-31%
IT	137.041	0,04	150.134	0,05	10%
Food & Drink	192.056	0,04	138.597	0,04	-28%
Architecture	117.445	0,04	112.261	0,04	-4%
Sports	128.304	0,06	100.540	0,03	-22%
Agriculture & Veterinary & Pets	69.774	0,02	36.325	0,01	-48%
Travel & Holiday & Guide	35.764	0,01	20.808	0,01	-42%
Others	2.344.852	0,72	2.126.903	0,66	-9%
<b>Total</b>	<b>323.831.361</b>	<b>100</b>	<b>319.992.728</b>	<b>100,00</b>	<b>-1%</b>

# Publishers Sales

## Sales to the Market

### Sold Copies

	2022	2023	VAR.%%
Educational	32.081.167	30.918.574	-3,6
Trade	89.651.981	79.003.546	-11,9
Religious	53.456.165	51.414.825	-3,8
Academic & Professional	12.387.755	11.142.528	-10,1
<b>Total</b>	<b>187.577.067</b>	<b>172.479.473</b>	<b>-8,0</b>

### Revenue (R\$)

	2022	2023	VAR.%%
Educational	1.271.567.989	1.286.612.607	1,2
Trade	1.524.150.793	1.486.473.627	-2,5
Religious	644.686.684	673.815.183	4,5
Academic & Professional	632.296.794	594.856.194	-5,9
<b>Total</b>	<b>4.072.702.259</b>	<b>4.041.757.610</b>	<b>-0,8</b>

### Average Price

	2022	2023	VAR.%%
Educational	39,64	41,61	5,0
Trade	17,00	18,82	10,7
Religious	12,06	13,11	8,7
Academic & Professional	51,04	53,39	4,6
<b>Total</b>	<b>21,71</b>	<b>23,43</b>	<b>7,9</b>

# Publishers Sales



Channels	2022		2023		2022 vs 2023
	Revenue (R\$)	Share %	Revenue (R\$)	Share %	
Exclusively Online Bookshops	1.435.145.245	35,24	1.312.220.727	32,47	-8,6%
Bookshops	1.082.305.641	26,57	1.130.576.186	27,97	4,5%
Distributors	665.775.803	16,35	682.201.479	16,88	2,5%
Schools	329.148.769	8,08	322.588.971	7,98	-2,0%
Publisher's Website & Marketplace	250.713.576	6,16	304.645.899	7,54	21,5%
Churches & Temples	91.090.281	2,24	90.391.383	2,24	-0,8%
Door-to-Door & Catalog	56.140.961	1,38	41.775.554	1,03	-25,6%
Export	24.757.890	0,61	36.199.483	0,90	46,2%
Book Fair/SP Biental	24.555.322	0,60	35.804.699	0,89	45,8%
Book Club	20.946.657	0,51	18.387.723	0,45	-12,2%
Companies	27.893.668	0,68	17.633.352	0,44	-36,8%
Supermarket	20.494.989	0,50	15.958.732	0,39	-22,1%
Private Library	19.990.958	0,49	8.758.255	0,22	-56,2%
Newsstand	8.074.725	0,20	7.872.861	0,19	-2,5%
joint sales with newspapers - promotional sales	-	-	785.040	0,02	-
Direct Marketing (Direct Mail, Mail)	803.461	0,02	304.165	0,01	-62,1%
Other	14.864.314	0,37	15.653.118	0,39	5,3%
<b>Total</b>	<b>4.072.702.260</b>	<b>100</b>	<b>4.041.757.610</b>	<b>100</b>	<b>-0,8%</b>

# Publishers Sales

▶ Sales to the Government

▶ Sold Copies

▶ Revenue (R\$)

	2022	2023	VAR.%%	2022	2023	VAR.%%
PNLD	115.724.160	119.236.919	3,04	1.148.828.263	1.510.343.026	31,47
PNLD Literature	3.160.078	26.535.784	739,72	21.817.522	323.910.111	1384,63
Total FNDE	118.884.238	145.772.703	22,62	1.170.645.785	1.834.253.137	56,69
Other Government Agencies	7.176.491	9.395.396	30,92	262.065.558	334.465.134	27,63
<b>Total</b>	<b>126.060.729</b>	<b>155.168.099</b>	<b>23,09</b>	<b>1.432.711.343</b>	<b>2.168.718.271</b>	<b>51,37</b>

# Publishers Sales

▶ Total Sales (Market+Government)

▶ Sold Copies

▶ Revenue (R\$)

	2022	2023	VAR.%%	2022	2023	VAR.%%
<b>TOTAL</b>	<b>313.637.796</b>	<b>327.647.572</b>	<b>4,5</b>	<b>5.505.413.602</b>	<b>6.210.475.881</b>	<b>12,81</b>

mariana.bueno.consultant@nielseniq.com  
producao.vendas@nielseniq.com