Books and the book trade in 2016 (2015 figures)

The importance of books

In 2015, books ranked a strong 14th in the list of the Germans' 51 most popular leisure activities. 19.7 per cent of German citizens over the age of 14 "often" read books after work (2014: 20.4 per cent), and another 28.3 per cent do so "occasionally" (2014: 29 per cent). As such, book reading maintained its position from the previous year (although with a nominal improvement of one place following the elimination of a category). 27.8 per cent "rarely" spent time reading a book (unchanged from the year before), while 24.2 per cent claimed they "never" do (2014: 22.8 per cent). Thus, the figures suggest a modest shift toward the non-readers.

Meanwhile, reading newspapers also declined slightly in popularity, with 51.6 per cent doing so "often" (2014: 52.1 per cent). On the other hand, another medium routinely declared dead enjoyed a leap in popularity: "listening to the radio" came in third, with a clear increase in numbers tuning in "often" (54.6 per cent, compared to 52.9 per cent in 2014). The use of audio books (ranked 44th) was also reflected in the survey, with 1.5 per cent of Germans listening to them "often" and 5.7 per cent "occasionally" (down from 1.6 and 6.4 per cent, respectively).

Still top of the list of hobbies – and increasing in popularity – is watching television. With a quota of 78.9 per cent (2014: 77 per cent), TV viewing is, by a wide margin, the leisure time activity that the largest number of Germans say they practise "often". As was expected, people's fondness for computer and video games increased, with 10.4 per cent of those questioned using them "often" in their free time (2014: 9.9 per cent).

Book-purchasing behaviour among German citizens over the age of 14 is examined in a separate analysis. Here too, 2015 showed a modest decline, with 59 per cent of respondents having bought books that year, compared to 60 per cent the year before. 41 per cent of these took at least three books home with them (2014: 43 per cent), 25 per cent bought five or more books (2014: 26 per cent), while 11 per cent put at least 10 books in their shopping baskets (2014: 12 per cent). The proportion of bigger spenders who purchase more than 20 books a year remained constant at five per cent.

As ever, women were the most important client group for the book trade, with 66 per cent being book buyers (2014: 67 per cent). The same single percentage point decline was seen among men, of whom 52 per cent bought books (2014: 53 per cent). In terms of age-group, little change was observed. As in the previous year, 59 per cent of young people between the ages of 14 and 19 claimed to have bought books over the past year. Among those of 70 or above, the book-buying 52 per cent share was still below average, although nevertheless enjoying another small increase (2014: 51 per cent, 2013: 50 per cent, 2012: 48 per cent).

The economic development of the German book market

Overall sales for the industry amounted to 9.188 billion euros in 2015, down 1.4 per cent on 2014. The previous year had already seen a decline of 2.2 per cent. As such, the German book market has lost some 400 million euros, or 4.3 per cent of its sales, over the past five years. However, taking a longer-term view back to 2005 shows that the industry's nominal sales have remained stable over the longer period. In the context of great upheaval and the huge competition from new digital media, this is undoubtedly a positive sign.

High-street booksellers achieved sales of just below 4.43 billion euros in 2015. As such they were still the most important sales channel, despite suffering a 3.4 per cent reduction in sales on the previous year. In 2014, the high street bookshops had already experienced a 1.2 per cent decline in revenues. They are currently responsible for 48.2 per cent of the industry's overall sales (2014: 49.2 per cent; 2005: 54.8 per cent). Thus the 50 per cent mark – which they first sank below in 2011 – has once again receded further than in the previous year.

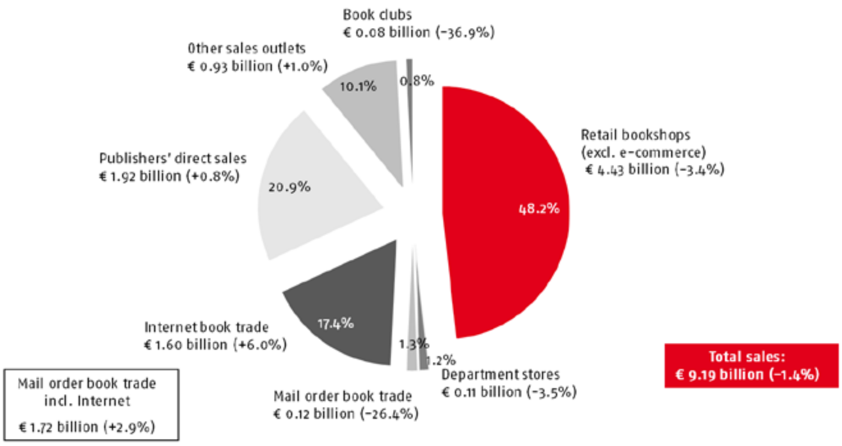
On the other hand, the online book trade managed to regain the ground it lost in 2013 and 2014 (declines of 0.5 and 3.1 per cent respectively). Sales through e-commerce rose by six per cent in 2015, with the online trade securing a 17.4 per cent share of the industry's sales. That is equivalent to 1.6 billion euros. Undoubtedly, much of this can be attributed to earnings by the market leader Amazon – but by no means all, because the figures also include the online revenues of the high-street booksellers, which have also recorded growing demand on the web.

A modest increase was also evident for publishers pursuing direct business (for instance with companies and institutions). Revenues through this sales channel grew by 0.8 per cent, amounting to an increased sales volume of 1.92 billion euros (market share: 20.9 per cent).

The clear loser in the Internet age is the traditional mail-order book trade, which experienced a 26.4 per cent fall in sales in 2015, after already having declined by 26 per cent in 2014. As such, the mail-order trade, selling books through catalogues, mailings or by telephone, now only accounts for 1.3 per cent of the industry sales (118 million euros). As recently as 2011, this sales channel was worth 289 million euros, with a market share of three per cent. The book clubs, too, have been pushed further towards the edge. In 2015 they made up only 0.8 per cent of all sales (2011: 2.0 per cent). Similarly, the book market also reflects the crisis affecting department stores, which only accounted for 1.2 per cent of total sales in 2015 (2005: 4.3 per cent). By contrast, the book business developed better than in the previous year in the "other sales outlets", including discounters, supermarkets, filling stations and even specialist electronics dealers. These channels managed to increase their sales by one per cent. As a result the market share of these ancillary markets reached double figures for the first time (2015: 10.1 per cent; 2014: 9.9 per cent; 2005: 8.9 per cent).

Estimated sales of bookselling enterprises

Distribution channels 2015



Market structures

Throughout Germany there are about 21,000 enterprises which are, in the broadest sense, involved in the production or sale of books. They are listed in the "Address Book of the German Book Trade", which is available online at www.adb-online.de. Around 15,000 of these companies – almost three quarters – are publishing houses or institutions involved in publishing. The term "bookselling enterprise" is defined very broadly. The Address Book includes, for instance, municipalities, university faculties, societies and institutions that only sporadically issue publications.

The number of companies that produce and distribute books or specialist and scientific magazines on a professional basis is much smaller than the Address Book suggests. Most of them are members of the German Publishers & Booksellers Association (Börsenverein des Deutschen Buchhandels), which represents the interests of the book industry across its different sectors. At the close of 2015, the association's membership stood at 4,963. This included 1,745 publishers, 71 book wholesalers and 19 publishers' representatives. Booksellers, which counted 3,064 enterprises, made up the majority of the membership. This figure also differs significantly from the Address Book, which lists as many as 6,000 booksellers. Unlike the membership statistics of the German Publishers & Booksellers Association, the Address Book includes individual entries for branch outlets. Added to this are the so-called book sales points, such as stationery shops, which focus on other segments, and where books make up just a small part if their complete range.

Information on the number of bookselling enterprises in Germany can also be derived from the VAT statistics supplied by the Federal Statistical Office, although these are currently only available for the years up to 2014. This source records all companies with an annual turnover greater than 17,500 euros, but it also makes other distinctions between the enterprises in question, compared to the German Publishers & Booksellers Association and the Address Book of the German Book Trade. According to these sales statistics, in 2014 there were 2,117 publishers and 3,803 booksellers in Germany. A comparison of these figures over several years shows a decline in the number of companies involved in either publishing or bookselling. Between 2010 and 2014, the number of companies operating as publishers declined by 103, while the number involved in selling books fell by almost 400.

Sales breakdown by category and form of publication

The fiction segment achieved the largest share of overall book sales (32.1 per cent). While this represents a fall on the previous year, it still remains strong compared to 2003, the first year of data collection. In 2003 the share of fiction was 29.5 per cent. Nevertheless, in this respect too, 2015 reflected a lack of major bestsellers. In 2012, the "Shades of Grey" series ensured higher revenues. After that, fiction sales declined by 3.5 per cent in 2013, by 6.7 per cent in 2014, and again in 2015 by 1.6 per cent.

The second most important source of sales in the book market is the children's and young adult category, which managed to sustain its market share of 15.8 per cent from 2014 to 2015. However, in terms of sales, this segment, too, recorded a modest fall for the year (down by one per cent).

In third place, as usual, came self-help books. Following the two bumper years of 2013 (up 5.5 per cent) and 2014 (up 1.2 per cent), this segment now had to cope with a 4.5 per cent decline. As such, their market share fell from 14.9 per cent in 2014 to 14.3 per cent in 2015.

The non-fiction segment, on the other hand, can look back on its second strong year in succession. Sales climbed by 1.6 per cent (2014: up 5.4 per cent), while its market share rose from 10.1 to 10.3 per cent. This growth is thanks to popular titles such as “Gut: the inside story of our body's most under-rated organ”, by the young doctor Giulia Enders (Ullstein), “The Hidden Life of Trees” by the forester Peter Wohlleben (Ludwig), and the political analysis, “My Journey into the Heart of Terror: Ten Days in the Islamic State” by Jürgen Todenhöfer (C. Bertelsmann).

The respective market shares of the remaining segments in 2015 were as follows: scientific books (all categories) achieved a combined share of 10.9 per cent; schools and learning achieved 10 per cent; and travel books achieved 6.5 per cent.

The fiction category was dominated by narrative literature (share of fiction 2015: 53.4 per cent), while second place went to suspense books (share of fiction 2015: 25.2 per cent). Sales for narrative literature remained stable compared to 2014 (up 0.2 per cent), whereas the suspense segment lost ground: last year saw a 3.5 per cent decline in revenue from crime novels, thrillers and such like – which followed an earlier 8.9 per cent drop in 2014. Part of this has presumably migrated to the e-book business, where the fiction share continues to grow.

The other important sub-categories of fiction also experienced negative developments in their sales last year. Comics, cartoons, humour and satire declined by 2.3 per cent, and gift books by 0.9 per cent, while science-fiction and fantasy literature faced a fall of 10.7 per cent.

In the children’s and young adult category, books for children up to 11 years have been the top sellers since 2013. In 2015, they accounted for 28.3 per cent of revenue (2014: 27.5 per cent). With a market share of 19.9 per cent (2014: 22.6 per cent), young adult books once again comprised the second strongest segment within the category. For years, third place here has gone to the picture book segment. In 2015, this managed to increase its share to 19.6 per cent, from 18.8 per cent in 2014.

As in previous years, food and drink was the largest segment among the self-help books, generating 27.4 per cent of sales in 2015 (2014: 28,0 per cent). However, the interest in vegan cookery books, which has buoyed the food and drink in recent years, has begun slowly to recede. In 2015, this had an impact on the entire self-help market, which saw its sales fall by 4.5 per cent on 2014. The most important genre in the food and drink segment remained themed cookery books, which enjoyed a 43.1 per cent share of sales (2014: 40.5 per cent). In second place, with a 14.3 per cent share (2014: 15.1 per cent), came the vogue subject of "healthy and slimming cuisine". Third place was taken by baking, which, with 10.6 per cent of the self-help sales in 2015, had a slightly smaller share than in the previous year (2014: 12.5 per cent).

At present, book customers have a taste for drinks. The market share of this segment climbed to 5.9 per cent, from 4.3 per cent in 2014. Books about freshly made smoothies sold best of all in 2015. Besides food and drink, important topics in the self-help market include health, life counselling and hobbies/home. Last year the Germans discovered a new favourite hobby, when colouring books for adults became top sellers.

Politics, society and economics are important subject matter during this period of European crisis and terrorism. With 32.3 per cent, this segment accounted for the biggest share of sales in the non-fiction category. It was followed by history books, which made up a further 15.1 per cent of non-fiction sales.

Sales indices for e-books in Germany

In 2015 e-books accounted for 4.5 per cent of all book sales for private use (excluding school textbooks and specialist books. 2014: 4.3 per cent; 2013: 3.9 per cent; 2012: 2.4 per cent, 2011: 0.8 per cent). As such, the German e-book market experienced further growth, but only to the comparatively moderate extent of 4.7 per cent. From 2011 to 2012 it expanded threefold, and in 2013 it still managed to increase by 60.5 per cent. By 2014 that growth had slowed to a more moderate 7.6 per cent.

However, looking at the absolute number of e-books sold, it is clear that the demand for digital books is growing more strongly than the sales figures suggest. The number of copies sold in the e-book market increased by about nine per cent (following a rise of roughly 15 per cent 2014). All told, in 2015 the industry sold 27 million e-books to private users, compared to 24.8 million in the previous year. The mismatch between the developments in sales turnover and numbers sold is due to the decline in prices for the titles bought. In 2015 customers paid an average of 6.82 euros for an e-book – 26 cents less than in 2014. Prices have declined significantly over the last five years. In 2010, users still paid 10.71 euros on average for each e-book, almost four euros more than today. The prices have come under pressure from the many low-cost or even free self-published titles, and from e-books such as older classics that are free in the public domain. New subscription models have also had an impact, such as those offered by platforms like Skoobe and Amazon (Kindle Unlimited).

Even so, the German e-book market is still a long way from resembling the US market, where digital books account for about a quarter of all book sales. However, the US market also saw a significant reduction in e-book sales in 2015. As the market research company Nielsen found out, the sales volume declined by 13 per cent compared to 2014. This was compensated for by increased print sales, which according to Nielsen, rose by 2.8 per cent in 2015, pushing the market share of e-books down from 27 per cent to 24 per cent.

The German e-book market for private users is clearly dominated by fiction, which accounted for 86 per cent of all turnover (2014: 84 per cent). Children's and young adult books achieved a four per cent share of those sales, one percentage point lower than the year before. Similarly lower by a percentage point were self-help books, which took a four per cent market share (2014: five per cent). There was obviously also less demand for non-fiction books and lexicons in 2015 (five per cent; 2014: six per cent). Travel books still contribute less than one per cent of e-book sales.

Book production in Germany

In 2015, the total number of titles produced by German book publishers (first editions and reissued titles) rose again, after having fallen to its lowest point of the past 10 years in 2014. Nevertheless, current production is still far below the record levels of 2007 and 2011, when the new releases numbered more than 96,000.

Despite this, with 89,506 new titles (first editions and reissued titles) on the market, 2015 still saw almost 2,400 more than in the year before (up by 2.7 per cent). The number of "real new releases" – i.e. first editions – showed particularly pronounced growth, reaching 76,547 (2014: 73,863), equivalent to 3.6 per cent or nearly 2,700 titles. As such, 85.5 per cent of all the new releases were genuinely new titles (2014: 84.8 per cent).

The largest number of these new titles – 14,165 – appeared once again in the fiction category, which thereby maintained an 18.5 per cent share of first editions. In second place, as usual, came German literature (10,638 new releases; 13.9 per cent). This category is listed separately (even though this might cause some overlapping) and it includes works of literary criticism, unlike the pure fiction category. Third place was once again taken by children’s and young adult books (9,081 new releases). In line with its increasing significance in terms of sales, this segment plays a more important role in book production than it did just a few years ago. In 2015, children's and young adult books made up 11.9 per cent of all first editions – an all-time high.

In 2015, most of the other categories also experienced an increase in the number of titles issued. For instance, publishers have enlarged their arts and entertainment portfolios, in which category about 1,500 additional new titles (!) were released. This may have something to do with the success of adult colouring books, which are often listed in this category. But it is also the category that includes comics, cartoons and caricatures, a segment which saw its title production go through the roof in 2015. The 2,581 brand-new pictorial stories amounted a huge 47.6 per cent leap from the 1,749 first editions of the year before. Last year, more titles were also released on the topic of languages (up 12.9 per cent). For example, the number of new titles for German language teaching increased by almost 100 (to 694 first editions). Numbers also increased in the subgroup of other languages (293 titles; up from 214 titles in 2014). This probably reflects the fact that publishers have released numerous language textbooks and phrasebooks for refugees.

The publication of paperbacks is evaluated in a separate statistical assessment. According to this, compared to 2014 the paperback share of first editions fell from 13.3 to 12.4 per cent. It is conceivable that publishers are reducing this form of (secondary) exploitation as the e-book is seen, at least in part, as a competitor of paperbacks. In all, 9,501 new paperback titles were published last year – 3.1 per cent fewer than in 2014. For fiction alone, almost 270 fewer new paperbacks came on to the market (4,802 titles, compared to 5,069 in 2014), and the category accounted for 50.5 per cent of all new paperback releases in 2015 (2014: 51.7 per cent). For children’s and adult books, paperback production also experienced a modest decline in 2015, with 927 new titles coming to the market, down from 975 in 2014.

Business with other countries

Translations

Publishers may have brought more new titles to the market last year, but in doing so they showed a much stronger focus on German-language titles than in previous years. In 2015, 10,179 works were translated into German from other languages or were reissued in German translation, some 630 fewer than the year before (down 5.9 per cent). Their relative importance in the book market also seems to be shifting. For a long time translations made up more than 12 per cent of all first editions and reissued titles, but in 2015 the figure fell to 11.4 per cent. If we ignore reprints and take only true first editions into consideration, the share of translations is somewhat higher, with 9,454 completely new book translations having come into the German market in 2015 – 508 fewer than in the year before, a drop of 5.2 per cent. Thus they make up 12.4 per cent of all new editions, compared to 13.5 per cent in the previous year.

English is unchallenged as the most important language of origin for translations for the German book market. In 2015, 6,031 new titles were translated from English into German (2014: 6,527). As such, books from the English-speaking countries accounted for 63.8 per cent of all translations

(2014: 65.5 per cent). Of the translations from English, 2,414 were fiction titles (2014: 2,635). Thus, in the context of the total 3,505 translated works of fiction published in 2015, English holds a 68.9 per cent share (2014: 70.2 per cent). This means more than two thirds of all fiction translations came from English. However, as recently as in 2012, English writing contributed even more to the fiction market (74.4 per cent). The coming years will show if this is a general trend. In 2011, just five years ago, the figure was only 69.6 per cent – not much higher than in 2015.

Alongside English, French too carries a certain weight in the translation rankings. Some 1,131 first editions, making 12 per cent of all translations, originated from French. That is 120 titles more than in the year before. The French share of fiction translations was likewise somewhat higher than before (8.4 per cent compared to 7.4 per cent in 2014). The literary traffic arriving in Germany from its western neighbour has boosted the number of first editions from 277 to 295. Ever since 2009, Japanese has held on to third place in the ranking of languages translated into German. In 2015, 628 titles were translated from this language into German – 6.7 per cent fewer than in the previous year. While this means 6.6 per cent of all translations (first editions) came from Japanese (2014: 6.8 per cent), Japanese books only contributed one per cent of the translated fiction titles (36 works). Most translated Japanese books were probably in the comics genre – above all manga titles. This year, fourth place was taken by Italian, which, with 272 translations (2014: 280), came in just ahead of the "crime novel-language" Swedish (270 translations; 2014: 283). Following a year's absence, Arabic made a re-entry in the top-20, attaining 15th place with 30 translations. Of these, 20 were fiction works.

The total share of translations among new releases as a whole (first editions) was 12.4 per cent. Where individual categories are seen to enjoy a high value in this respect, translations play a prominent role for that genre. A good example of this is fiction, in which category 24.7 per cent of all first editions were translations. In 2014 the figure had been 26.6 per cent. The share of titles originating abroad has also been declining in a longer-term view. In 2011 and 2012 it was significantly higher than today's level, with 28.4 and 28.7 per cent respectively. In 2010 it even amounted to 30.3 per cent. In total, last year saw the publication of 3,505 translated works of fiction – 250 fewer than in the year before (down 6.7 per cent). It would seem that publishers now place greater confidence in the appeal of German authors – or perhaps they have grown cautious about the high price of licensing and translation. Nevertheless, fiction still accounted for more than a third of all translations (37.1 per cent; 2014: 37.7 per cent).

The second most important segment for the overall German translation market is children's and young adult books (with a 19.2 per cent share of all translations). In recent years, partly due to the fantasy and all-age trend, this increasingly had been setting its sights internationally, but in 2015 this was reversed. Whereas in 2014, translations from other languages still accounted for 24.5 per cent of all children's and young adult books, last year that figure declined to 20 per cent, even lower than the 2011 level (22.9 per cent). Altogether, 1,812 children's and young adult books were translated into German last year (2014: 1,997).

Another significant force in the market are comics, which have now achieved a 14.3 per cent share of all translations (2014: 13.7 per cent; 2011: 11.3 per cent). There is a clear international domination of this segment, in which licences from other languages accounted for 52.4 per cent of all first editions (2014: 78.0 per cent; 2011: 78.1 per cent). Thus comics are leaders in this respect (except for the foreign literature category itself, where the share is naturally higher). In 2015, 1,352 comics were translated into German, which was similar to the year before (1,365 titles). The fact that the share of translations in the overall comic segment nevertheless fell by around 25 percentage points is due to the huge expansion in the overall production of comics. It is a field in which German-speaking storytellers and illustrators are gaining tangibly in significance.

Licensing

The licensing trade for German publishers was much more lively in 2015 than in 2014. Last year, they sold a total of 7,521 works "made in Germany" beyond the country's borders, while in 2014 just 6,443 contracts were signed (an increase of 16.7 per cent).

The countries with which German publishers do the most trade keep changing over time, and 2015 again saw a reordering among the top-10 destinations. While in 2014, Poland, Russia and Spain shared third place in the overall ranking, each accounting for five per cent of the licensing business, in 2015 the field was more spread out: Spain regained second place with 412 contracts (a 5.5 per cent share; 2014: 324 contracts); France made way and slipped down to seventh place (306 contracts/4.1 per cent; 2014: 334); Italy, on the other hand, climbed from fourth to third place (409 contracts/5.4 per cent; 2014: 289); and Russia had to make do with eighth place (293 contracts/3.9 per cent; 2014: 324). This time round, Poland came fourth in the list with 367 contracts, a share of 4.9 per cent (2014: 324).

For several years the leading licensing partner has been China. Here, the total number of contracts signed was 1,512 – more than three and a half times as many as second-placed Spain. This represented an increase of more than 570 licences from 2014 to 2015. Chinese also tops the list of target languages, with a 20.1 per cent share of all licences (2014: 15.3 per cent). English claimed second place in this ranking, which reflects the large extent of the English-speaking areas, albeit with a relatively modest 7.6 per cent share (2014: seven per cent). The second global language, Spanish, came in third with 5.8 per cent (2013: 7.4 per cent).

The Chinese-speaking partners are particularly keen on children's and young adult books, for which 765 contracts were completed – more than half the total number (2014: 428 Licences). The enormous growth in the licensing business with China is largely thanks to this literature for the next generation. Within this category the strongest demand is for picture books (333 contracts; 2014: 184). Especially in the children's books segment, Chinese partners are very keen to buy entire series; this soon converts into corresponding peaks and dips in the statistics. This could also explain why non-fiction and non-fiction picture books experienced a decisive leap in demand in China last year. For this genre, 227 licences were successfully negotiated, making an almost threefold increase on the number in 2014 (84 contracts). Another highlight was in the sale of books for teenagers (46 contracts; 2014: 11). For children's books (up to 11 years) 67 contracts were signed (2014: 39). The second most important licensing area in China was the scientific, technical and medical segment, which accounted for 355 licenses (2014: 281). As in the previous year, books on medicine clearly led the way, with 170 licences (2014: 122). Also doing well was the social sciences, law and business segment, which excelled with 121 contracts in 2015, up from 33 in the year before. This was above all thanks to certain popular business titles (84 deals; 2014: 26). All told, last year German publishers completed 32.1 per cent of their licensing deals with Asian partners (2014: 25.5 per cent; 2011: 25.1 per cent).

However, the German publishers' most important licensees in terms of quantity are still those based in Europe. Once again sales were strong in 2015, and the German publishers completed 61.2 per cent of all their licensing deals with European partners. (2014: 65.5 per cent, 2011: 68.5 per cent). Although the growth in China pushed down the Europeans' percentage share, the licensing trade in

Europe is still healthy. 2015 saw the completion of 4,602 contracts here – almost 400 more than the year before. Heading the list of European buyers was Spain, with 412 contracts (2014: 324).

The most important category for the whole licensing trade, regardless of country, are children's and young adult books. With 2,677 licences, they made up 35.6 per cent of all sales (2014: 2,362). Within this segment, the largest number of contracts (854) were for picture books. The second-best-selling category was fiction, which accounted for 16.4 per cent of contracts in 2015 (2014: 18.6 per cent). Here, the absolute number of contracts was 1,236 (up from 1,197 in 2014). Third place in the ranking belonged to self-help books, with 897 licenses sold (2014: 815) and an 11.9 per cent share of the rights trade. Particularly successful here were the hobby/home segment (264 contracts; 2014: 302) and counselling/daily life (230 licences; 2014: 191).

Foreign trade

Import and export data for the book industry are currently only available up to 2014. As in previous years, the figures show that exports of book industry products are economically much more significant for Germany than imports. For some years, the value of exports has been approximately twice that of imports, which is mainly due to the German-speaking neighbours Austria and Switzerland. As such, the industry can demonstrate a fundamentally positive foreign trade balance.

Moreover, both imports and exports for the book industry showed a clear upward curve in 2014, following a rather lean year in 2013 (although this applied to foreign trade as a whole). The value of book product exports climbed above the two billion euros mark once again, while imports regained the billion euros threshold. In 2014, import sales amounted to 1.09 billion euros – a 9.9 per cent improvement on the year before, when sales had fallen by 5.7 per cent. Export sales amounted to 2.04 billion euros, the growth of 2.6 per cent almost compensating for the decline in 2013 (down 2.7 per cent).

For exports and imports alike, books were by far the most important product category traded by the book industry (which also includes calendars, magazines, newspapers, cartographic products and musical notes). From 2013 to 2014, their share of exports grew from almost 61 per cent to 64 per cent (books and picture books combined), and they amounted to about 68 per cent of imports (2013: 61 per cent). Book imports in particular therefore achieved an almost record level of increase. Five years previously, in 2010, the value of books imported to Germany amounted to 563 million euros. In 2014, this figure had reached about 741 million euros (books and picture books combined).The second-placed product group for both exports and imports were newspapers, whose share of the trade in either direction – but especially for imports – fell below the 30 per cent mark in 2014.

A large proportion of the imported titles are supplied from the United Kingdom, serving the growing demand for English-language books. Almost a quarter (23.5 per cent) of all book imports originate in the UK, making it the number-one country of origin – as in previous years. Significant changes were seen in the other ranking positions. Poland, which had not previously featured in the top 10, rose precipitously in 2014 to be the second most significant importing country, with a volume of around 123 million euros. The reason for this rapid development was Amazon. The online trader opened two new depots in Poznan and Wroclaw which it also uses to supply neighbouring areas of Germany. This is turning Poland into an import motor for the book business. It means China had to surrender its traditional second place, falling back to third. It has secured its high ranking in recent years through the provision of printing services. German publishers use these services, among other things, for coproduction projects and for demanding or complicated book editions. However, as the latest import statistics show, China seems to be losing ground as a significant location for printing. The value of books imported from China in 2014 fell to around 93 million euros from the roughly 110 million euros of the previous year (down 15.7 per cent). All told, 13.5 per cent of imported book trade items were supplied from Asian countries. In 2013, the figure had been 17.3 per cent, and in 2012 even 19.5 per cent.

Although the European countries only account for 81.6 per cent of imported printed goods, they are the most important export partners for the same, with 91.2 per cent of the total. The largest buyers of German printed products are Austria and Switzerland, which is understandable due to the shared language. In 2014, however, Germany delivered fewer books to both these neighbours than in the year before (Austria: 6.8 per cent fewer; Switzerland: 4.5 per cent fewer). By contrast, in the UK books made in Germany were in significantly higher demand than they had been in 2013. Here, the export trade grew by an astonishing 75 per cent to nearly 190 million euros. One possible explanation (but in view of the enormous expansion, surely not the only one) is that German publishers are producing more and more titles in English, for instance in the non-fiction segment. For this reason, the UK has occupied third place in the ranking of export countries for several years now.

As Amazon's delivery policy influenced the export statistics as well as the import figures, Poland came fourth on the list of important export countries for books in 2014. With a volume of around 102 million euros (2013: approx. 23 million euros), it rose from ninth place the year before. After all, for the books to be delivered to German customers from Poland, they first have to be sent there by the German publishers.

Source: German Publishers & Booksellers Association 2016
From: Buch und Buchhandel in Zahlen 2016