

# “PRODUCTION AND SALES OF THE BRAZILIAN PUBLISHING SECTOR”



## WHAT IS THE BRAZILIAN PUBLISHING SECTOR PRODUCTION AND SALES RESEARCH?

- AN ESTIMATE, PREPARED ACCORDING TO DATA FROM A SAMPLE OF PUBLISHING HOUSES, OF THE PUBLISHING SECTOR AND SUBSECTORS PERFORMANCE DURING ONE YEAR.

## HOW IS THE RESEARCH DONE?

-STARTING BY THE REVIEW OF THIS SAMPLE BEHAVIOUR, THE DATA FROM THE UNIVERSE OF THE SECTOR IS UPDATED EVERY YEAR.

## HIGHLIGHTS

**1) BRAZILIAN BOOKS PUBLISHING SECTOR STRONGLY FELT THE IMPACTS OF THE RETRACTION EXPERIENCED BY BRAZILIAN ECONOMY IN 2015. THEIR GROWTH WAS RATED THIS YEAR IN A NEGATIVE 3.27% PERCENTAGE, WHICH MEANS A REAL DECREASE OF 12.63%, CONSIDERING THE IPCA VARIATION OVER THE LAST YEAR.**

**2) THE MAIN FACTOR THAT LED TO THIS VERY BAD RESULT WAS THE MARKET SEGMENT'S BEHAVIOR, WITH A NEGATIVE 3.99% NOMINAL GROWTH. THE GOVERNMENT SECTOR, IN SPITE OF AN ALSO NEGATIVE NOMINAL RESULT, PRESENTED A SMALLER DECREASE, OF 0.86%**

**3) THE NUMBER OF COPIES SOLD TO THE MARKET SUFFERED A REDUCTION OF 8.19% AND, IF WE CONSIDER ALSO THE SALES TO THE GOVERNMENT, THE DECREASE IN THAT VARIABLE REACHED 10.65%.**

**4) AS A RESULT, CONSIDERING ONLY SALES TO THE MARKET, WE CAN SEE THAT THE AVERAGE BOOK PRICE INCREASED BY 4.57% IN 2015, SHOWING AN ACTUAL REDUCTION OF 5.55%. THIS VARIABLE THUS RESUMES THE DOWNWARD TREND THAT HAS BEEN GOING ON FOR A FEW YEARS AND WHICH WAS BRIEFLY AND SLIGHTLY, INTERRUPTED IN 2014.**

# BRAZILIAN PUBLISHING BEHAVIOR

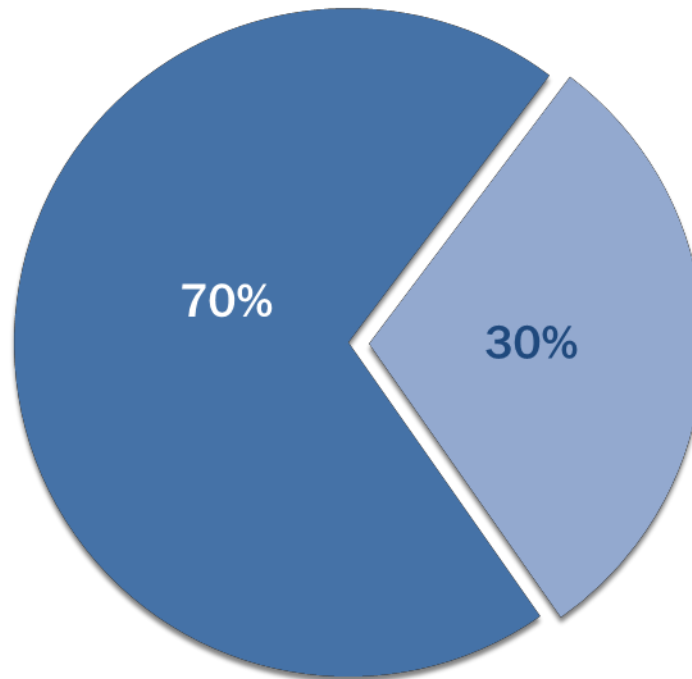
## 2014/2015

	2014	2015	Var. %
<b>TITLE</b>	<b>60,829</b>	<b>52,427</b>	<b>-13.81</b>
<b>PRODUCED BOOKS Total</b>	<b>501,371,513</b>	<b>446,848,571</b>	<b>-10.87</b>
<b>TURNOVER (R\$) Total</b>	<b>5,408,506,141.17</b>	<b>5,231,396,423.43</b>	<b>-3.27</b>
<b>Market</b>	<b>4,169,658,915.19</b>	<b>4,003,182,263.47</b>	<b>-3.99</b>
<b>Government</b>	<b>1,238,847,225.98</b>	<b>1,228,214,159.96</b>	<b>-0.86</b>
<b>SOLD BOOKS Total</b>	<b>435,690,157</b>	<b>389,274,495</b>	<b>-10.65</b>
<b>Market</b>	<b>277,387,290</b>	<b>254,680,102</b>	<b>-8.19</b>
<b>Government</b>	<b>158,302,867</b>	<b>134,594,394</b>	<b>-14.98</b>

# PARTICIPATION OF THE SAMPLE

(sample/deduced)

## TOTAL



■ Amostra

■ Inferido

# TITLES PUBLISHED AND PRODUCED COPIES

NEW ISBN's NUMBERS AND REPRINTS 2014/2015

Production	Titles			Copies		
	2014	2015	var. % 2014/2015	2014	2015	var. % 2014/2015
New ISBN's Numbers	19,285	17,282	-10.39	90,891,196	87,525,534	-3.70
Reprint	41,544	35,146	-15.40	410,480,317	359,323,037	-12.46
<b>TOTAL</b>	<b>60,829</b>	<b>52,427</b>	<b>-13.81</b>	<b>501,371,513</b>	<b>446,848,571</b>	<b>-10.87</b>

## TOTAL TITLES PUBLISHED AND PRODUCED COPIES BY SUBSECTOR

(New ISBN's numbers + Reprints)						
Subsector	Titles			Reprints		
	2014	2015	var. % 2014/2015	2014	2015	var. % 2014/2015
Textbooks	13,945	12,152	-12.86	235,288,478	221,214,936	-5.98
General Titles	23,171	18,319	-20.94	139,758,997	112,814,417	-19.28
Religious	7,938	7,241	-8.78	82,129,522	77,358,173	-5.81
CTP	15,775	14,715	-6.72	44,194,516	35,461,046	-19.76
<b>TOTAL</b>	<b>60,829</b>	<b>52,427</b>	<b>-13.81</b>	<b>501,371,513</b>	<b>446,848,571</b>	<b>-10.87</b>





## Titles Published and Produced Copies by por subsector - New ISBN (2014/2015)

Production	Titles			Copies		
	2014	2015	Var. %	2014	2015	Var. %
Textbooks	687	684	-0.47	6,668,678	6,638,014	-0.46
General Titles	8,951	7,184	-19.74	57,175,367	55,118,790	-3.60
Religious	1,856	1,828	-1.54	15,164,585	14,142,309	-6.74
CTP	7,791	7,586	-2.63	11,882,565	11,626,420	-2.16
<b>TOTAL</b>	<b>19,285</b>	<b>17,282</b>	<b>-10.39</b>	<b>90,891,196</b>	<b>87,525,534</b>	<b>-3,70</b>

## Titles Published and Produced Copies by por subsector - Reprint (2014/2015)

Production	Titles			Copies		
	2014	2015	Var. %	2014	2015	Var. %
Textbooks	13,258	11,469	-13.50	228,619,800	214,576,921	-6.14
General Titles	14,221	11,135	-21.70	82,583, 630	57,695,627	-30.14
Religious	6,081	5,413	-10.99	66,964,937	63,215,863	-5.60
CTP	7,984	7,129	-10.70	32,311,951	23,834,626	-26.24
<b>TOTAL</b>	<b>41,544</b>	<b>35,146</b>	<b>-15.40</b>	<b>410,480,318</b>	<b>359,323,037</b>	<b>-12.46</b>

# PRODUCTION BY THEMATIC AREA 2014/2015

Subject	2014		2015	
	Number of Copies	Partic. (%)	Number of Copies	Partic. (%)
Textbooks	211,518,868	42.19	219,390,259	49.10
Religious	81,408,282	16.24	87,672,975	19.62
Adult Literature	48,491,769	9.67	31,649,010	7.08
Self-help	21,676,729	4.32	19,369,691	4.33
Children's Literature	37,259,612	7.43	12,499,466	2.80
Youth Literature	20,085,348	4.01	11,277,437	2.52
Law	14,285,422	2.85	9,280,811	2.08
Medicine, Pharmacy, Public Health and Hygiene	6,426,059	1.28	8,292,267	1.86
Economics, Adm. and Business and Public Admin.	10,879,973	2.17	7,736,148	1.73
Humanities and Social Sciences	9,130,883	1.82	7,715,728	1.73
Arts	519,344	0.10	7,119,870	1.59
Languages and Linguistics	8,587,803	1.71	6,924,069	1.55
Biographies	5,265,245	1.05	4,193,354	0.94
Education and Pedagogy	3,879,854	0.77	1,983,337	0.44
Psychology and Philosophy	2,001,885	0.4	1,940,703	0.43
Mathematics, Statistics, Logic and Natural Sciences	2,108,127	0.42	1,463,913	0.33
Tourism, Leisure and Gastronomy	4,254,486	0.85	1,337,063	0.30
Physical Education and Sports	1,743,258	0.35	1,041,909	0.23
Engineering and Technology	2,653,205	0.53	1,001,887	0.22
Dictionaries and School Atlas	1,668,272	0.33	920,532	0.21
Agricultural Veterinary and Pets	405,926	0.08	533,322	0.12
Information Technology, Computation and Programming	612,453	0.12	459,708	0.10
Architecture and Urbanism	64,030	0.01	49,699	0.01
Others	6,444,682	1.29	2,995,414	0.67
<b>TOTAL</b>	<b>501,371,513</b>	<b>100</b>	<b>446,848,571</b>	<b>100</b>

# TURNOVER AND SOLD COPIES TO THE MARKET

## BY EDITORIAL SUBSECTOR 2014/2015

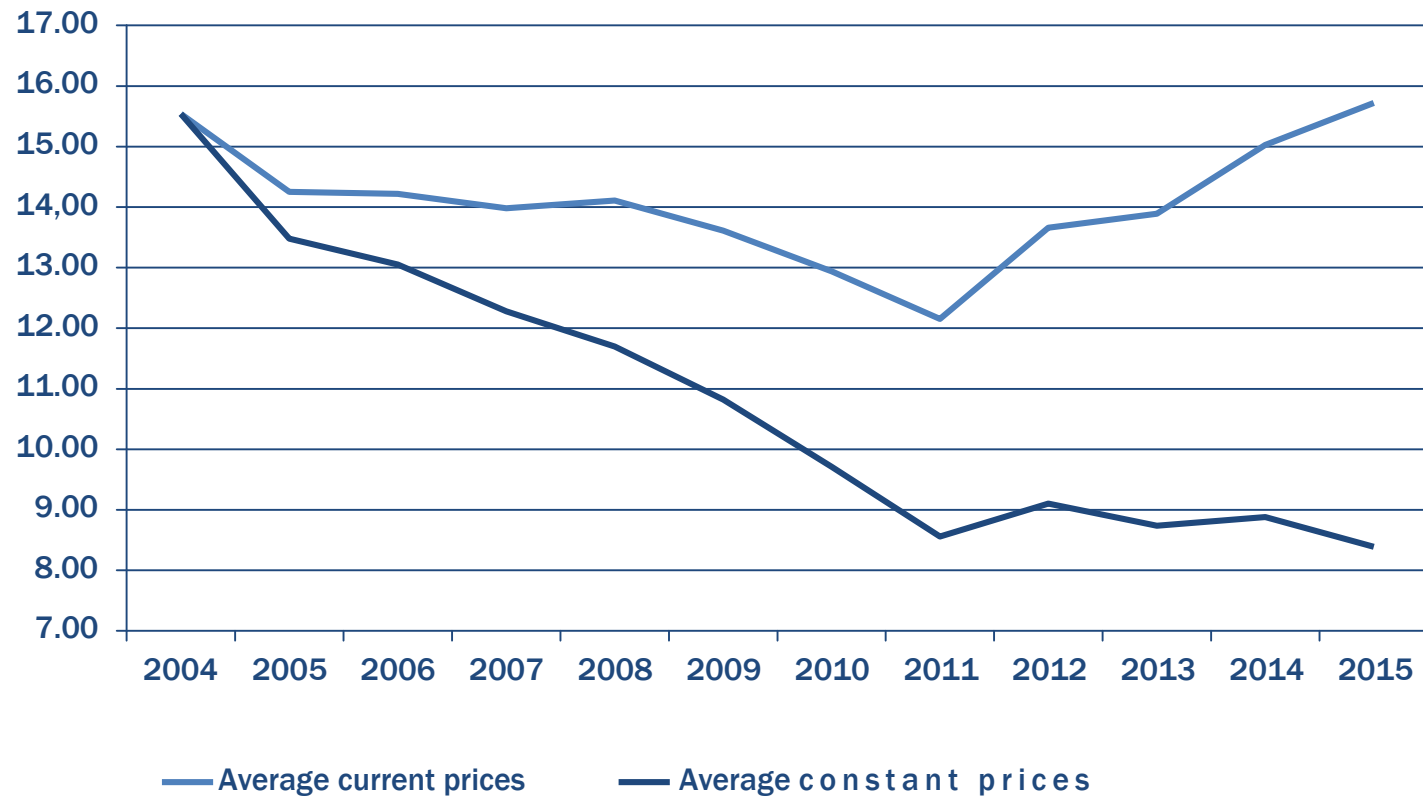
SUBSECTOR	Turnover (R\$)			Sold Copies		
	2014	2015	Var. %	2014	2015	Var. %
Textbooks	1,446,367,040.52	1,386,064,754.90	-4.17	57,260,368	50,772,492	-11.33
General Titles	1,103,704,361.74	1,076,053,793.87	-2.51	115,072,869	109,104,528	-5.19
Religious	558,131,978.66	558,902,652.71	0.14	73,437,782	68,416,938	-6.84
CTP	1,061,455,534.28	982,161,061.98	-7.47	31,616,271	26,386,144	-16.54
<b>TOTAL</b>	<b>4,169,658,915.20</b>	<b>4,003,182,263.47</b>	<b>-3.99</b>	<b>277,387,290</b>	<b>254,680,102</b>	<b>-8.19</b>

# AVERAGE PRICEMARKET

2014/2015

SUBSECTOR	2014	2015	Var. %
Textbooks	25.26	27.30	8.08
General Titles	9.59	9.86	2.83
Religious	7.60	8.17	7.49
CTP	33.57	37.22	10.87
TOTAL	15.03	15,72	4,57

# AVERAGE BRAZILIAN EDITORIAL PRICES 2004-2015/SOLD TO THE MARKET (R\$)



# Turnover and Sold Copies to the Government

By Editorial Subsector Editorial 2014/2015

TYPES OF SALES	Turnover (R\$)		Sold Copies			
	2014	2015	Var. %	2014	2015	Var. %
PNLD	1,001,854,198.75	1,156,447,920.29	15.43	120,724,108	132,171,274	9.48
PNBE	159,448,338.30	-	-	31,424,020	-	-
PNAIC	15,214,537.35	-	-	3,243,805	-	-
Federal Government Total	1,176,517,074.40	1,156,447,920.29	-1.71	155,391,933	132,171,274	-14.94
Other Government Agencies	62,330,151.58	71,766,239.67	15.14	2,910,934	2,423,120	-16.76
Government Total	1,238,847,225.98	1,228,214,159.96	-0.86	158,302,867	134,594,394	-14.98

# GOVERNMENT'S AVERAGE PRICE 2014/2015

	2014	2015	Var. %
PNLD	8.30	8.75	5.43
PNBE	5.07	-	-
PNAIC	4.69	-	-
Other Government Agencies	21.41	29.62	38.32

# Turnover and Total Sold Copies

## ( MARKET + GOVERNMENT )

Turnover (R\$)				Sold Copies		
	2014	2015	Var. %	2014	2015	Var. %
TOTAL	5,408,506,141.17	5,231,396,423.43	-3.27	435,690,157	389,274,495	-10.65



# TEXTBOOKS SUBSECTOR

	2014	2015	Var. %
TITLES	13,945	12,152	-12.86
PRODUCED COPIES Total	235,288,478	221,214,936	-5.98
TURNOVER(R\$) Total	2,491,687,951.80	2,544,783,653.46	2.13
Market	1,446,367,040.52	1,386,064,754.90	-4.17
Government	1,045,320,911.28	1,158,718,898.56	10.85
SOLD COPIES Total	184,200,099	179,395,126	-2.61
Market	57,260,368	50,772,492	-11.33
Government	126,939,731	128,622,634	1.33

# GENERAL TITLES SUBSECTOR

	2014	2015	Var. %
<b>TITLES</b>	<b>23,171</b>	<b>18,319</b>	<b>-20.94</b>
<b>PRODUCED COPIES Total</b>	<b>139,758,997</b>	<b>112,814,417</b>	<b>-19.28</b>
<b>TURNOVER (R\$) Total</b>	<b>1,275,177,090.04</b>	<b>1,144,533,581.78</b>	<b>-10.25</b>
<b>Market</b>	<b>1,103,704,361.74</b>	<b>1,076,053,793.87</b>	<b>-2.51</b>
<b>Government</b>	<b>171,472,728.30</b>	<b>68,479,787.91</b>	<b>-60.06</b>
<b>SOLD COPIES Total</b>	<b>142.769.420</b>	<b>115.018.471</b>	<b>-19.44</b>
<b>Market</b>	<b>115.072.869</b>	<b>109.104.528</b>	<b>-5.19</b>
<b>Government</b>	<b>27.696.551</b>	<b>5.913.944</b>	<b>-78.65</b>

# RELIGIOUS SUBSECTOR

	2014	2015	Var. %
TITLES	7,938	7,241	-8.78
PRODUCED BOOKS Total	82,129,522	77,358,173	-5.81
TURNOVER (R\$) Total	559,648,204.36	559,044,021.71	-0.11
Market	558,131,978.66	558,902,652.71	0.14
Government	1,516,225.70	141,369.00	-90.68
SOLD COPIES Total	73,642,915	68,428,201	-7.08
Market	73,437,782	68,416,938	-6.84
Government	205,133	11,263	-94.51

# CTP SUBSECTOR

	2014	2015	Var. %
TITLES	15,775	14,715	-6.72
PRODUCED BOOKS Total	44,194,516	35,461,046	-19.76
TURNOVER (R\$) Total	1.081,992,894.98	983,035,166.47	-9.15
Market	1,061,455,534.28	982,161,061.98	-7.47
Government	20,537,360.70	874,104.49	-95.74
Sold copies Total	35,077,723	26,432,697	-24.65
Market	31,616,271	26,386,144	-16.54
Government	3,461,452	46,553	-98.66

# FTURNOVER AND SOLD COPIES

## (MARKET + GOVERNMENT)

SUBSECTOR	Turnover (R\$)			Sold Copies		
	2014	2015	Var. %	2014	2015	Var. %
Textbooks	2,491,687,951.80	2,544,783,653.46	2.13	184,200,099	179,395,126	-2.61
General Titles	1,275,177,090.04	1,144,533,581.78	-10.25	142,769,420	115,018,471	-19.44
Religious	559,648,204.35	559,044,021.71	-0.11	73,642,915	68,428,201	-7.08
CTP	1,081,992,894.98	983,035,166.47	-9.15	35,077,723	26,432,697	-24.65
<b>TOTAL</b>	<b>5,408,506,141.17</b>	<b>5,231,396,423.43</b>	<b>-3.27</b>	<b>435,690,157</b>	<b>389,274,495</b>	<b>-10.65</b>

# PRODUCED TITLES AND EDITED COPIES

## (TRANSLATED AND NATIONAL AUTHORS 2014/2015)

Production	Titles			Copies		
	2014 (%)	2015	Var. (%)	2014	2015	Var.
Translated	5,918	4,781	-19.21	26,186,676	19,877,367	-24.09
National Authors	54,911	47,646	-13.23	475,184,837	426,971,204	-10.15
<b>TOTAL</b>	<b>60,829</b>	<b>52,427</b>	<b>-13.81</b>	<b>501,371,513</b>	<b>446,848,571</b>	<b>-10.87</b>

# MARKETING CHANNELS

## MARKET SALES – NUMBER OF COPIES 2014/2015

CANAIS	Number of Copies			
	2014	Partic. %	2015	Partic. %
Bookstores	138,281,607	49.85	130,643,748	51.30
Distributors	55,762,895	20.10	43,608,767	17.12
Doorstep Selling and Catalog	26,200,892	9.45	24,607,516	9.66
Churches and Temples	11,366,291	4.10	11,116,837	4.37
Supermarket	9,045,138	3.26	7,196,043	2.83
Schools	6,944,797	2.50	6,475,933	2.54
Companies	3,961,571	1.43	5,857,398	2.30
Exclusively Online Booksellers	-	-	5,018,607	1.97
Direct Marketing	3,667,217	1.32	4,391,358	1.72
Newsstands	5,409,567	1.95	4,075,047	1.60
Internet (sales made by the publisher site)	1,960,817	0.71	2,108,818	0.83
Exportations	2,909,134	1.05	2,076,279	0.82
Private libraries	306,630	0.11	736,034	0.29
Joint sale with newspapers	484,294	0.17	418,367	0.16
Others	11,086,440	4.00	6,349,351	2.49
<b>TOTAL</b>	<b>277,387,290</b>	<b>100</b>	<b>254,680,102</b>	<b>100</b>

# MARKETING CHANNELS

MARKET SALES – TURNOVER 2014/2015

CHANNELS	2014	Turnover Partic. %	2015	Partic. %
Bookstores	2,507,579,259.72	60.14	2,336,629,670.04	58.37
Distributors	879,782,010.66	21.10	837,805,595.21	20.93
Doorstep Selling and Catalog	224,509,753.65	5.38	243,150,003.88	6.07
Supermarket	67,606,891.72	1.62	71,139,667.77	1.78
Exclusively Online Booksellers	-	-	70,523,355.82	1.76
Schools	66,929,062.84	1.61	70,474,211.75	1.76
Churches and Temples	59,592,439.57	1.43	62,891,261.00	1.57
Exportations	59,341,856.,91	1.42	48,811,082.40	1.22
Direct Marketing	49,587,150.,67	1.19	39,247,896.47	0.98
Companies	27,494,632.67	0.66	32,495,279.35	0.81
Private libraries	1,720,050.61	0.04	30,018,827.59	0.75
Internet (sales made by the publisher site)	25,894,558.25	0.62	27,418,318.87	0.68
Newsstands	31,197,530.27	0.75	13,471,185.80	0.34
Joint sale with newspapers	21,140,564.05	0.51	4,131,004.91	0.10
Others	147,283,153.60	3.53	114,974,902.61	2.87
TOTAL	4,169,658,915.,19	100	4,003,182,263.47	100



# MARKETING CHANNELS

MARKET SALES - 2015

CHANNELS	Number of Copies 2015	Partic. %	Turnover 2015	Partic. %
Bookstores	130,643,748	51.30	2,336,629,670.04	58.37
Distributors	43,608,767	17.12	837,805,595.21	20.93
Doorstep Selling and Catalog	24,607,516	9.66	243,150,003.88	6.07
Churches and Temples	11,116,837	4.37	62,891,261.00	1.57
Supermarket	7,196,043	2.83	71,139,667.77	1.78
Schools	6,475,933	2.54	70,474,211.75	1.76
Companies	5,857,398	2.30	32,495,279.35	0.81
Exclusively Online Booksellers	5,018,607	1.97	70,523,355.82	1.76
Direct Marketing	4,391,358	1.72	39,247,896.47	0.98
Newsstands	4,075,047	1.60	13,471,185.80	0.34
Internet (sales made by the publisher site)	2,108,818	0.83	27,418,318.87	0.68
Exportations	2,076,279	0.82	48,811,082.40	1.22
Private libraries	736,034	0.29	30,018,827.59	0.75
Joint sale with newspapers	418,367	0.16	4.131.004,91	0.10
Others	6,349,351	2.49	114,974,902.61	2.87
<b>TOTAL</b>	<b>254,680,102</b>	<b>100</b>	<b>4,003,182,263.47</b>	<b>100</b>

# DIGITAL CONTENT

# DIGITAL CONTENT – NUMBER OF TITLES

	Number of titles (books assets)	New ISBN's Numbers	Sold Copies	Turnover (R\$)
TOTAL	45,838	3,866	1,264,517	20,439,476.97

Digital content data show the sum of the results obtained by the publishers who responded to the survey (189 publishers), and not the entire survey universe. We do not have yet a survey that indicates the order of magnitude of the universe of variables related to the production and sales of digital content, which prevents us from performing the statistical inference process.